Kuali Time Complete User Guide

Table of Contents

Introduction to Kuali Time and Attendance 3
- What is Kuali Time? 3
- Why is it used? 3
- Who uses it? 4
- When is it used? 4
- How does it work? 4
  - Work Area Example: 5
- Recommended System Specifications 6
  - Desktop Devices 6
  - Kiosk Card Readers 6
- Kuali Time User Roles 6

Employee Options 8
- Timesheets 9
  - Timesheet Creation 9
  - Clock-Entry vs. Manual-Entry 9
  - Logging into your Timesheet in OneStart 9
  - Logging in to your Timesheet via a Kiosk 10
  - Timesheet Overview and Navigation 10
- Clock-Entry Timekeeping 13
  - Clocking In and Out 14
  - Clocking In/Out Using a Kiosk 14
  - Adding a Missed Punch 14
  - Correcting a Time Block Clocked on the Wrong Job 16
  - Viewing (and Correcting) Automatic Meal/Lunch Deductions 16
  - Time Detail Tab 16

Manual-Entry Timekeeping 17
  - Adding Time Blocks to a Timesheet 17
  - Editing Existing Time Blocks 19
  - Deleting Time Blocks 19
- Viewing and Entering Leave Hours 19
  - Viewing Your Leave Accrual Hours 19
  - Adding Leave Hours to a Timesheet 20
  - Editing Leave Hours on a Timesheet 21
  - Deleting Leave Hours from a Timesheet 21
- Timesheet Errors and Warnings 22
  - Getting Help and Reporting Problems 22

Other Employee Options Available in Kuali Time 23
  - Viewing Recorded Time Blocks on your Pay Period Calendar 23
  - Viewing a Summary of Worked Hours 23
  - Changing Comp Hours to Overtime and Vice Versa) 24
  - Notifying Your Timesheet Approvers 25
  - Adding a Timesheet Note 25
  - Viewing the Route Log 26
  - Viewing Jobs, Assignments or Roles 26
  - Logging Out 27

Approver Options 27
- Overview of the Approvals/Payroll Processor tab 27
- Monitoring, Reviewing and Correcting Timesheets 30

Sorting Timesheets by Department and Work Area 31
Searching for Specific Timesheets 31
Sorting Timesheets by Approval Status 32
Viewing Previous and Next Timesheets 32
Viewing Timesheets by Year and Pay Period 32
Returning to the Current Pay Period 33
Viewing Timesheet Warnings and Notes 33
Viewing Employee Work Status 34
Opening and Closing the 'Summary View' of Employee Hours 34
Opening a Timesheet 35
Adding a Time Block to a Timesheet 35
Editing Existing Time Blocks 37
Deleting a Time Block 37
Approving a Missed Punch Document 38
Adding a Timesheet Note 41
Deleting Automatic Meal Deductions 41
Viewing Employee Jobs, Assignments and Time Roles 41
Adjusting Shift Differential Hours 42
Adjusting Overtime Hours for Work Study Employees 42
Timesheet Approval and Routing 42
Employee Approvals 42
Supervisor (Time Approver) Approvals 42
Payroll Processor Approvals 42
Timesheets Not Ready to Approve 43
Approving Timesheets 43
Automated Approvals 46
Time Hours on the Payroll Voucher 47
Checking the Route Log 47
Time Reports in the IUIE 48

More Options for Approvers 48
Using Inquiry Pages 48
Time Block Inquiry 48
Time Block History Inquiry 50
Clock Log Inquiry 51
Missed Punch Inquiry 52
Viewing Timekeeping Rules 54
Rule Look-up Example 55
Viewing Work Area Details 55

Department Administrator Options 57
Timekeeping Rules 57
How Rules Work 58
Rule Hierarchy 58
Effective Dates 59
Searching for Rules 59
Creating a New Rule 60
Editing a Rule 61
Inactivating a Rule 62
Clock Location Rule 63
Department Lunch Deduction Rule 65
Time Collection Rule 67
Shift Differential Rule 67
Administrative Functions 68
Creating a New Work Area 69
Adding a Delegate for a Time Approver 71
Editing a Work Area, Task or Role 72

Inactivating a Work Area 73
Removing a Task 73
Removing an Approver, Approver Delegate or Reviewer Role 73
Viewing Work Area Details 74
Adding Departmental Roles (Department Admin, Department View Only, Payroll Processor and Payroll Processor Delegate) 75
Removing Departmental Roles 76
Viewing Department Details 76
Viewing Earn Code Details 78
Inquiries 79
Maintaining Time Assignments through eDocs 79
New Hires 80
Understanding Assignments and Funding 81
Terminations 82
Adding / Editing / Removing a Time Assignment 82
Editing Earnings Information 84
Removing an Employee from Kuali Time 84
HRMS Updates to Kuali Time 84

Introduction to Kuali Time and Attendance

What is Kuali Time?

The Kuali Foundation launched a project, entitled Kuali People Management for the Enterprise (KPME). KPME will be an open source, comprehensive and enterprise-wide Human Resources/Payroll system designed BY and FOR institutions of higher education. As part of Phase 1 of this project, a Time and Attendance module was developed, called Kuali Time.

Kuali Time provides hourly, support and service staff, and biweekly professional employees a 24/7 electronic timekeeping system to record hours worked, hours in pay status, and absent time in an easy-to-use, always accessible, web-based interface. It handles multiple jobs, pay types, and pay cycles based on employees active appointments within a department. It also calculates all special rates of pay such as overtime, shift differential, premium, and holiday pay.

The system also provides approval routing based on jobs so designated supervisors and departmental payroll processors can view and approve employee timesheets online.

Why is it used?

The primary purposes of the timekeeping system are:

- Elimination of paper-based, departmental, or outsourced systems
- Appropriate approval routing based on jobs and labor distribution
- Transfer of approved hours directly into the Payroll Voucher
- Consistent application of an institution's policy as well as state and federal labor laws
- Generation of relevant reports that are useful for tasks such as labor budgeting
- Easy auditing of records and reports

Who uses it?

The Kuali Time system is used by hourly and biweekly staff employees on all eight IU campuses.

- Employees use the system to record the hours they work. The system supports hourly and flat-rate employees which allow it to handle uncommon pay conditions. Employees also use Kuali Time to record leave balance usage such as days off when sick or on vacation.
- Approvers/Supervisors use Kuali Time to review, modify, and approve the hours their employees have recorded. Additionally, they can view the rules (lunch deduction, shift rules, etc.) set up for their department.
- Reviewers have the same 'view and edit' timesheet options as Supervisors; however, they lack the ability to approve timesheets.
- Payroll Processors can also review, modify and approve hours recorded. Additionally, they can view the rules (lunch deduction, shift rules, etc.) set up for their department.
- Department Administrators are granted access to departmental administrative functions in Kuali Time which allows them to create Work Areas, add supervisors and payroll processors for approval routing, and view all rules and update certain rules for their department.
- Location Administrators are limited by campus location, and can access all timesheets and some administrative functions for that campus, view system and location rules, and provide support to answer questions or assist users.
- System Administrators are able to access all timesheets, administrative and system functions and provide support to answer questions or assist users.
- View Only users are granted access to view, but not modify timesheets either globally, or for a specific location or department.

When is it used?

The Kuali Time system is available 24 hours, 7 days a week, and 365 days a year for employees to record hours worked and for approvers to process timesheet approvals.

At the end of every two-week pay period, supervisors and payroll processors will need to approve all timesheets. Approvers can access timesheets by logging into the Kuali Time system and using the Approval tab to review and approve timesheets. Approvers can also access the Approval tab via their Kuali (Workflow) Action List, or via the link in their notification emails. Approved timesheets feed hours information into the HRMS Payroll Voucher.

How does it work?

Kuali Time is a web-based application and can be accessed from any network-connected device with a web browser. Employees will log into the Kuali Time central portal which provides access to timesheets for either Clock-Entry or Manual-Entry of hours worked.

Some departments have established Kiosks which are Windows-based PCs that are dedicated solely for Kuali Time system access. Kiosks are specially configured through Window's Group Policies to only allow use of the Kuali Time application (users can't surf to other websites, for example). Kiosks can also be configured to work with a card reader that allows employees to swipe an employee ID card to authenticate instead of logging in with a username and passphrase.

Departments first create Work Areas in Kuali Time to define areas where employees can record their work, and to set up the Approval Routing for timesheets. In addition, Kuali Time allows optional divisions of Work Areas called Tasks, which permits departments to track the hours an employee works on a particular project. When setting up a Work Area, a Department should route timesheets for approval to an employee's immediate

supervisor (the person who knows what hours the employee has worked), and then to the payroll clerk who verifies those hours are correct on the HRMS Payroll Voucher.

Work Areas are also used to define multiple rules in the system, such as Time Collection rules to designate whether the employee will clock in/out or manually record time blocks, and Clock Location rules to designate the computer (by IP location) where the employee is expected to clock in/out.

Together, the work area and task are used to set up Assignments that the employee selects to record work hours or to enter leave hours on a timesheet.

Work Area Example:

Department: BL-BOOK
Work Area: Cashier
Supervisor: John McGuire
Payroll Processor: Sally Farnsworth
Employees: Daniel Smith Ramona Sinclair

Department: BL-BOOK
Work Area: Warehouse
Supervisor: Rita Goodfellow
Payroll Processor: Sally Farnsworth
Employees: Ray Johnson Daniel Smith

The above example shows one Department with two different Work Areas in Kuali Time. Notice that the Work Areas have different Supervisors but the same Payroll Processor. In addition, one employee (Daniel Smith) works in both Work Areas. When employees have their job record (and Job Funding) associated with a Work Area or Task it appears as a "Time Assignment" on their timesheet.

Employees can have many different Assignments or even multiple Assignments associated with the same job. Tasks can be used to split employees within a Work Area into smaller groups for project or reporting purposes. For example, let's say an hourly employee who referees various sports, belongs to a Work Area called "Refereeing." Since this Department needs to track the number of hours the employee spends refereeing each sport, (basketball, soccer, and volleyball), they set up three Tasks in that Work Area. That will create three separate Assignments on the timesheet, and the employee can record work hours under each one.

Employees either clock in/out or manually edit their timesheet to record hours worked under one or more Assignments. Staff employees, who earn leave benefits, can also enter any leave hours they take during that pay period, such as sick or vacation.

At the end of each pay period, the timesheet is routed to the Supervisor for approval and the Employee can still access it until that approval is done. Each Supervisor must review and approve all hours worked under their specific Work Area, along with any leave hours taken. Once the Supervisor has approved the hours, the Payroll Processor approves hours for all the Work Areas for which they are responsible within that Department. Once the timesheet is Final, it can only be changed at that point by the System Administrator.

In the above Work Area example for BL-BOOK, Daniel's timesheet will route to both supervisor John (Work Area: Cashier) and supervisor Rita (Work Area: Warehouse) for approval of hours worked in their work area. John will be able to see Warehouse hours on Daniel's timesheet but he is not able to add/modify/delete those hours because he does not have a Kuali Time role in that Work Area. The opposite is true for Rita; she can view the Cashier hours, but can only add/modify/delete hours worked in the Warehouse. As the Payroll Processor for both work areas, Sally has the ability to change any hours on Daniel's timesheet.

After all approvals are recorded, the hours for that employee are transferred to the HRMS payroll system as part of a regularly scheduled extraction process. These hours automatically populate the payroll voucher, which is then used to generate the pay for that employee.

Recommended System Specifications

Note: These configurations are current as of the publication of this User Manual.

Desktop Devices

Workstations must run Windows 7, XP or Vista with Internet Explorer version 5.5 Service Pack 2 or newer.

Kuali Time may function with other operating systems and browsers such as Mozilla Firefox or Chrome, but customer support is not provided for these other configurations.

Kiosk Card Readers

Kiosk card readers using an ActiveX control allows the session to be refreshed for the next user (instead of closing/reopening the browser).

Contact Time Support or IU Purchasing for information on purchasing card readers for kiosks used in recording time for the Kuali Time system.

Kuali Time User Roles

Each user is assigned a role that determines which navigational tabs they will see after logging in. Below is a description of each User Role and the tabs that are visible once that user logs into the system.

Employee tabs may include:

- Clock: Clock-Entry employees use this tab to clock in and out.
- Time Detail: All employees (with a valid Time Assignment) can see this tab. Clock-Entry employees use this tab to review their daily, weekly or total hours for the pay period and to add time blocks for any leave hours taken. Manual-Entry employees use this tab to add all of their time blocks for hours worked and leave hours taken.
- Leave Accrual: Employees who earn leave use this tab to verify their leave balances.
- Person Info: Available to all users. Displays job, assignment and role information for an employee.
- Help: Displays information to help employees, approvers and reviewers use the system.

View-Only tabs may include:

- Time Detail: View-Only users use this tab to view timesheets but do not have any editing capabilities.
- Admin: View-Only users use this tab to view global, (campus) location or departmental rules depending on their level of access, or to run several types of inquiries to view timesheet data.
- Person Info: Available to all users. Displays job, assignment and role information for the selected employee.
- Help: Displays information to help employees, approvers and reviewers use the system.

Supervisor/Approver tabs may include:

- Clock: After opening an employee's timesheet, supervisors can use this tab to clock the employee in/out or to submit a Missed Punch document to record a missed clock action. (If the Supervisor is a Clock-Entry employee, they will use this tab to clock in/out on their own timesheet.)
- Time Detail: After opening an employee's timesheet, supervisors use this tab to enter time block corrections for that employee. (If the Supervisor is a Manual-Entry employee, they use this tab to add time blocks on their own timesheet.)
- Leave Accrual: After opening an employee's timesheet, supervisors can use this tab to verify an employee's leave balances and ensure usage is correct. (If the Supervisor has a timesheet, they use this tab to view their own leave balances.)
- Approvals: Supervisors use this tab to review, edit and approve timesheets for their employees.
- Admin: Supervisors use this tab to "view" the rules or maintenance pages that impact their department. They can also run several types of inquiries to view timesheet data.
- Person Info: Available to all users. Displays job, assignment and role information for an employee.
- Help: Displays information to help employees, approvers and reviewers use the system.

Payroll Processor tabs may include:

- Clock: After opening an employee's timesheet, supervisors can use this tab to clock the employee in/out or to submit a Missed Punch document to record a missed clock action. (If the Supervisor is a Clock-Entry employee, they will use this tab to clock in/out on their own timesheet.)
- Time Detail After opening an employee's timesheet, supervisors use this tab to enter time block corrections for that employee. (If the Supervisor is a Manual-Entry employee, they use this tab to add time blocks on their own timesheet.)
- Leave Accrual After opening an employee's timesheet, supervisors can use this tab to verify an employee's leave balances and ensure usage is correct. (If the Supervisor has a timesheet, they use this tab to view their own leave balances.)
- Payroll Processor: Payroll Processors use this tab to review, edit and approve timesheets for their employees.
- Admin: Payroll Processors use this tab to "view" the rules or maintenance pages that impact their department. They can also run several types of inquiries to view timesheet data.
- Person Info: Available to all users. Displays job, assignment and role information for an employee.
- Help: Displays information to help employees, approvers and reviewers use the system.

Reviewer tabs may include:

- Clock: After opening an employee's timesheet, Reviewers can use this tab to clock the employee in/out or to submit a Missed Punch document to record a missed clock action. (If the Reviewer is a Clock-Entry employee, they will use this tab to clock in/out on their own timesheet.)
- Time Detail: After opening an employee's timesheet, Reviewers use this tab to enter time block corrections for that employee. (If the Reviewer is a Manual-Entry employee, they use this tab to add time blocks on their own timesheet.)
- Approvals: Reviewers use this tab to review and edit timesheets for their employees.
- Leave Accrual: After opening an employee's timesheet, reviewers can use this tab to verify an employee's leave balances and ensure usage is correct. (If the Reviewer has a timesheet, they use this tab to view their own leave balances.)
- Person Info: Available to all users. Displays job, assignment and role information for an employee.
- Help: Displays information to help employees, approvers and reviewers use the system.

Department Administrator tabs may include:

- Clock: If a Clock-Entry employee, Department Administrators use this tab to clock in/out on their timesheet.

- Time Detail: If a Manual-Entry employee, Department Administrators use this tab to add time blocks on their timesheet.
- Leave Accrual: On their timesheet, Department Administrators use this tab to verify their leave balances.
- Admin: Department Administrators can use this tab to add or edit departmental Work Areas, Clock Location and Lunch Deduction rules or to view Department, Earn Code, Shift Differential and Time Collection rules.
- Person Info: Available to all users. Displays job, assignment and role information for an employee.
- Help: Displays information to help employees, approvers and reviewers use the system.

Location Administrator tabs may include:

- Clock: If a Clock-Entry employee, Location Administrators use this tab to clock in/out on their timesheet.
- Time Detail: If a Manual-Entry employee, Location Administrators use this tab to add time blocks on their timesheet.
- Leave Accrual: On their timesheet, Location Administrators use this tab to verify their leave balances.
- Approvals: If this user also has Supervisor roles, they use this tab to review, edit and approve timesheets for those employees.
- Payroll Processor: If this user also has Payroll Processor roles, they use this tab to review, edit and approve timesheets for those employees.
- System Admin: Location Administrators use this tab to view Clock Location, Lunch Deduction, Shift Differential and Time Collection rules for the campus location where they are an administrator, to update Lunch Deduction, and Clock Location rules, to update user roles for a Department, to lookup Earn Codes and Earn Code Groups, and to run inquiries on clock actions, time blocks, time block history and missed punches. In addition, they can add or edit Work Areas and Initiate Timesheets for their campus.
- Person Info: Available to all users. Displays job, assignment and role information for an employee.
- Help: Displays information to help employees, approvers and reviewers use the system.

System Administrator tabs may include:

- Clock: If a Clock-Entry employee, System Admins use this tab to clock in/out on their timesheet.
- Time Detail: If a Manual-Entry employee, System Admins use this tab to add time blocks on their timesheet.
- Leave Accrual: On their timesheet, System Admins use this tab to verify their leave balances.
- Admin: System Admins can access all departmental maintenance and rules pages to define attributes associated with employees and work areas, and can run inquiries on clock actions, time blocks, time block history and missed punches.
- System Admin: System Admins can access all system maintenance and rules pages to define attributes associated with employees, work areas, departmental and system-level settings, and can run various batch jobs and system reports.
- Person Info: Available to all users. Displays job, assignment and role information for an employee.
- Help: Displays information to help employees, approvers and reviewers use the system.

If you have more than one role in Kuali Time you will see the appropriate tabs for each role.

Employee Options

This section provides a description of the timesheet used in Kuali Time, including navigational options. In addition, it describes the two methods used to record work or leave hours, and explains how to use the timesheet to record hours, and report missed clock punches.

Timesheets

Every employee in Kuali Time has one timesheet per pay period. At Indiana University, pay periods are two weeks long, so the pay period is set up as "biweekly' (beginning and ending at midnight on Sunday). Each FSLA (Fair Labor Standards Act) pay period meets the standard for overtime hours, overtime pay and collected unpaid overtime. Each timesheet represents a document in the Kuali Rice/Workflow system—a routing and approval engine used to manage who can view and take actions on a particular timesheet document.

Timesheet Creation

Employees with active Kuali Time assignments during the pay period will have timesheets created automatically the Friday before the next pay period begins, or when the batch job is scheduled. The batch job can be run nightly to create timesheets for newly hired employees.

Reviewers, Supervisors (Time Approvers), Payroll Processors, and Department Administrators will be able to access an employee's timesheet as soon as it is created.

If an employee is missing a timesheet, one may need to be created by the System Administrator who can use the Timesheet Initiate Maintenance document to do so. Please contact your Supervisor or Payroll Processor or else submit an issue via the Time Support Form, http://www.fms.indiana.edu/support/support_form.asp. Please include the employee's Principal ID (University ID) number in the request.

Clock-Entry vs. Manual-Entry

There are two methods an employee may use to record regular pay hours:

1. Clock-Entry is used when capturing exact in and out times. After an employee logs in, the timesheet opens on the Clock tab. This tab includes a clock section with a dropdown list of active Clock Assignments, and employees select the appropriate assignment to clock in or out. Clock buttons that may be visible here include Clock In, Clock Out and Missed Punch.

   When a Clock Out is recorded, Kuali Time evaluates many business rules (shift differential, overtime, etc.) to determine what the net timesheet result will be for the Time Block created. The system records the clock out in the clock log, and shows your current Work Status (clocked in, clocked out, etc.)

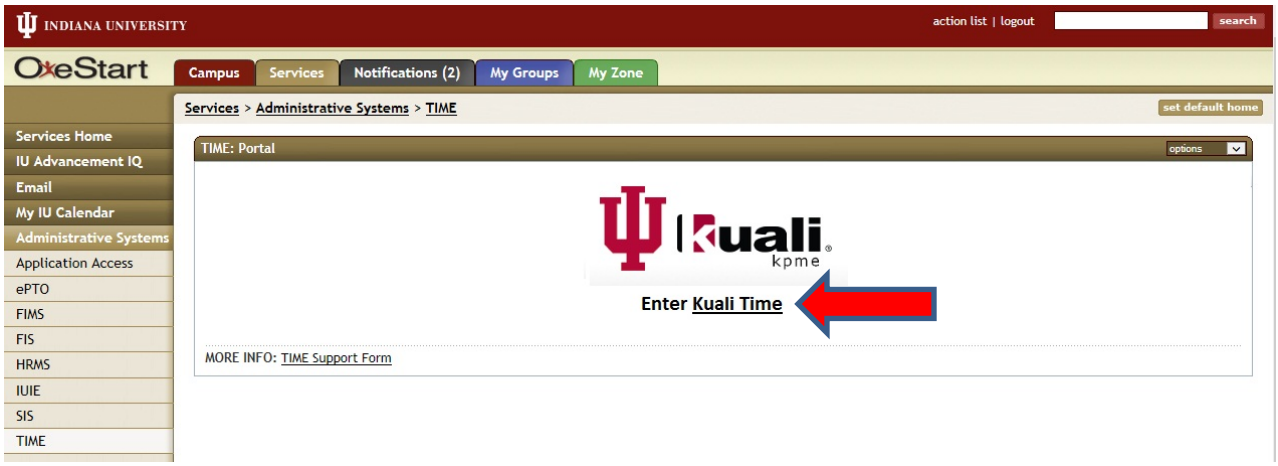
   Only assignments where you must clock in and out will show up in the Clock Assignment dropdown. If you also have Manual-Entry assignments you will need to click on the Time Detail tab to manually enter those work hours (see Manual-Entry below).

2. Manual-Entry is used when clocking is not required, and the hours worked are recorded by entering blocks of time manually onto the timesheet. After logging in, the timesheet opens on the Time Detail tab. Manual-Entry assignments do not appear on the Clock tab. If your only time assignment is a Manual-Entry assignment, there will be no Clock tab on your timesheet.

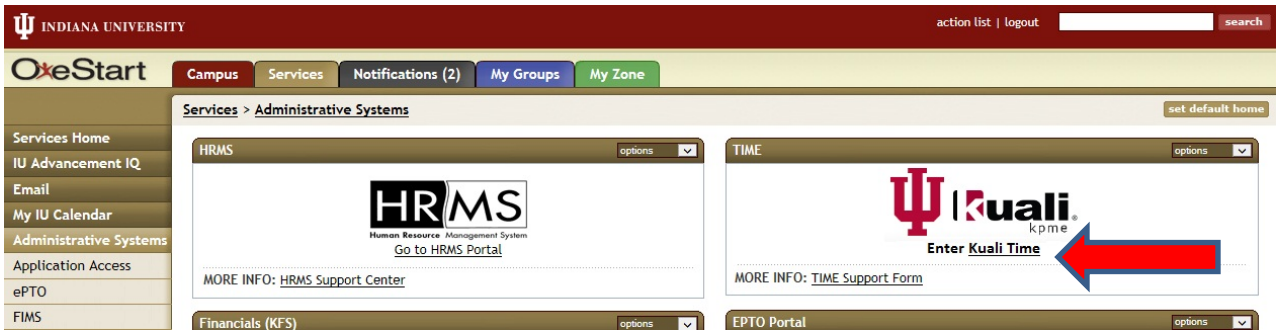
Logging into your Timesheet in OneStart

To open a timesheet, an Employee will enter their username and passphrase to log into OneStart (https://onestart.iu.edu).

Then, in the left menu page, choose Administrative Systems, then TIME, and in the "TIME Portal," click on the Enter Kuali Time link.



Or, an Employee can log into OneStart, select Administrative Systems, go to the TIME channel and click on the Enter Kuali Time link.



Each Employee is assigned a user role that determines which navigational tabs they will see after logging in.

Logging in to your Timesheet via a Kiosk

Departments not using PCs will use Kiosks—computer's dedicated to the Kuali Time system. Click the login button on the Kiosk computer screen to open the login screen, and then enter your username and passphrase to login and open your timesheet.

If the Kiosk has a card reader, just swipe your employee ID card, and that opens your timesheet.
If you have a problem with the card reader, click the login button on the Kiosk screen and enter your username and passphrase to login and open your timesheet.

Timesheet Overview and Navigation

When you open a timesheet, it shows side by side Navigation tabs that you can use to navigate from page to page. These tabs show where you are and where you can go within the timesheet.

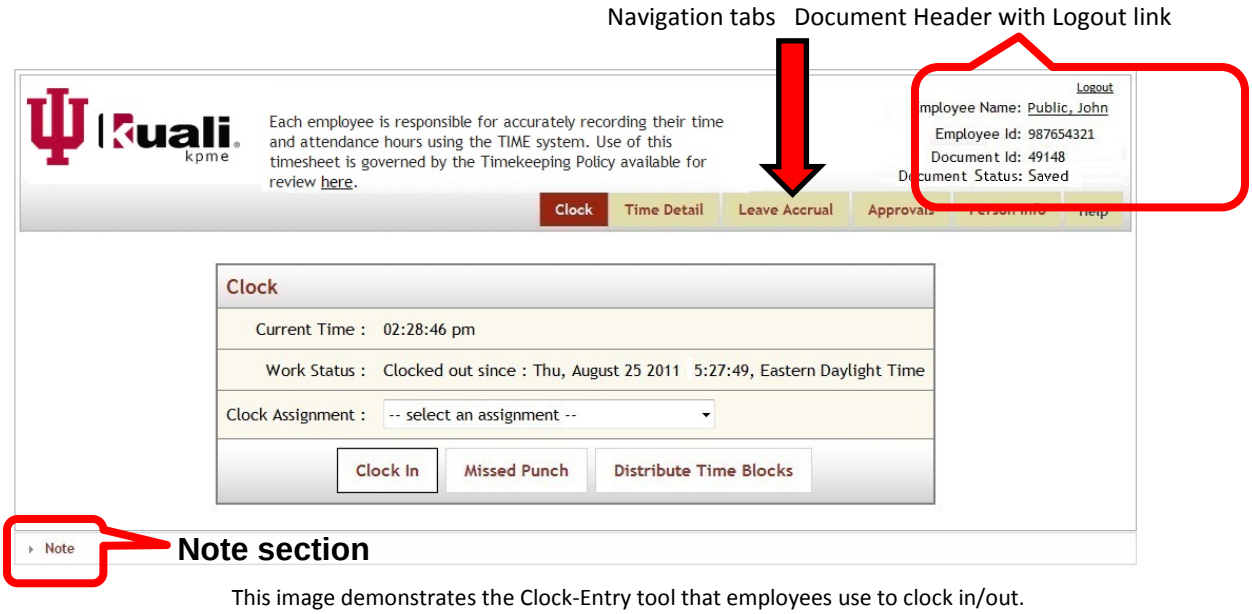
To navigate to any other page in your timesheet, just click on that tab.

- If you are an employee with a Clock-Entry assignment, your timesheet will open on the Clock tab so you can easily clock in and out. This tab also provides a Note section, so you can add a note to your timesheet. (See Clock tab illustration below.)

- All employees (whether Clock-Entry or Manual-Entry) will have the Time Detail tab. This tab provides a Note section, so you can add a note to your timesheet and a Route Log section so you can view its routing activity. (See Time Detail tab illustration on the next page.)

    - If you have a Manual-Entry assignment, your timesheet will open on this tab, where you manually add the time blocks you have worked each day on your pay period Calendar.

    - If you accrue paid time-off, you also use this tab to enter the number of leave hours you have taken.


Navigation tabs
Document Header with Logout link
Kuali kpme
Each employee is responsible for accurately recording their time and attendance hours using the TIME system. Use of this timesheet is governed by the Timekeeping Policy available for review here.
Logout
Employee Name: Public, John
Employee Id: 987654321
Document Id: 49148
Document Status: Saved
Clock
Time Detail
Leave Accrual
Approvals
Clock
Current Time : 02:28:46 pm
Work Status : Clocked out since : Thu, August 25 2011 5:27:49, Eastern Daylight Time
Clock Assignment : -- select an assignment --
Clock In
Missed Punch
Distribute Time Blocks
Note
Note section

This image demonstrates the Clock-Entry tool that employees use to clock in/out.

Other navigational tabs you may see on your timesheet include the Leave Accrual tab, Person Info tab and the Help tab. If you are an employee who also approves timesheets, you will see the Approvals tab and/or the Payroll Processor tab.

All timesheets display a "Document Header" in the top right corner that includes your identifying information, such as Employee Name, Employee Id, (timesheet) Document Id, and Document Status (Saved, Enroute, or Final). This header also includes a Logout link that is used to log out of the system and close the timesheet.

If you click on your underlined Employee Name here, it will open the Person Info tab where you can view details about your Time assignments, jobs, and roles. Or you can click on the Person Info tab to open the same page. If you click on the Leave Accrual tab, you can see any vacation, sick or other leave hours that you have accrued.

All employees (whether Clock-Entry or Manual-Entry) will have the Time Detail tab which opens a calendar view of the pay period covered by the timesheet—14 days.

Clock-Entry employees will use this tab to review the time blocks they have clocked on the timesheet and to manually enter any paid time-off (leave) hours, such as sick, vacation or PTO they took during the pay period.

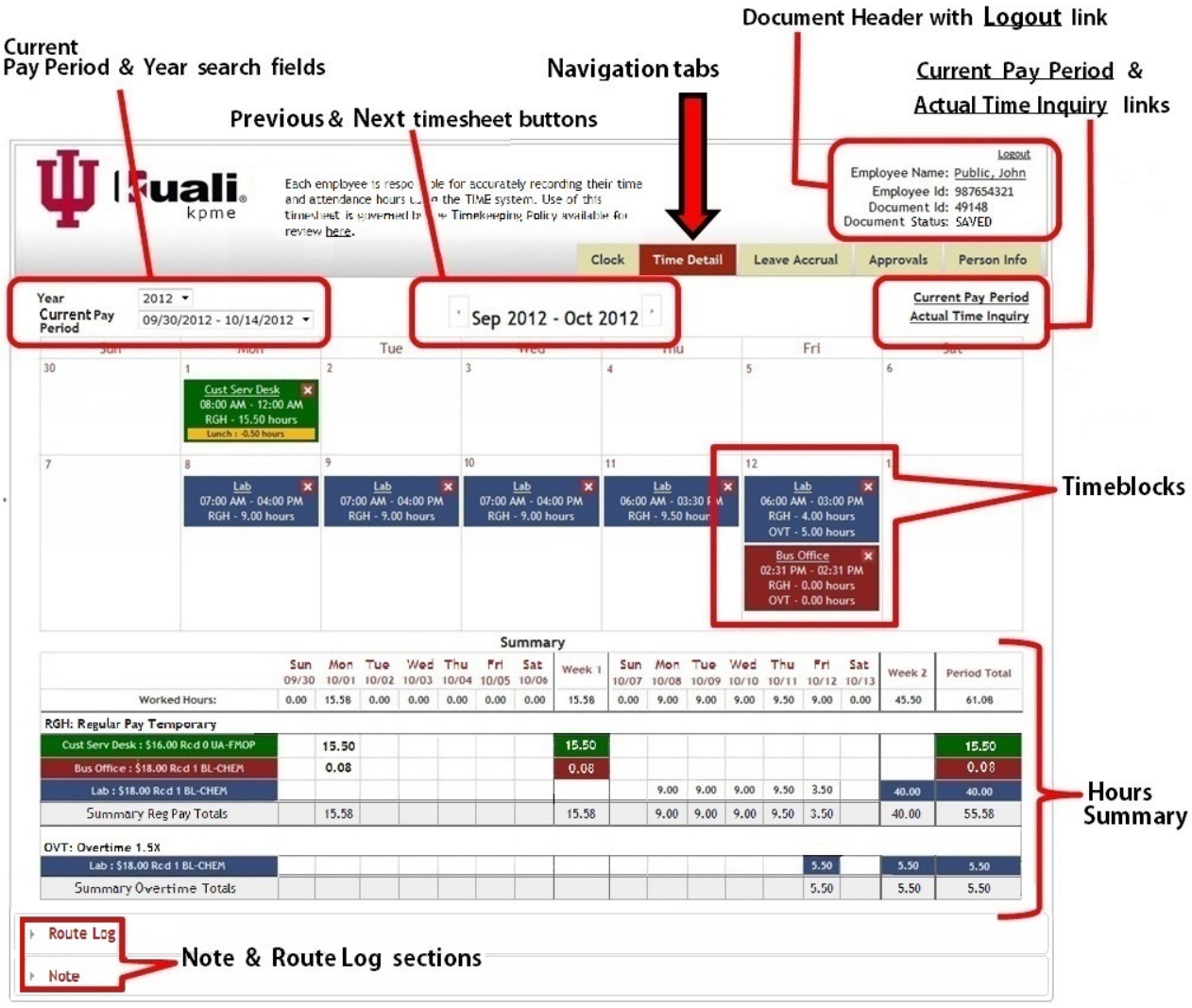
Manual-Entry employees will use this tab to manually add time blocks for the hours they have worked and the paid time off (leave) hours they have taken.

There are Previous and Next arrow buttons located on each side of the Pay Period heading that allows you to scroll back and forth by pay period, in chronological order, and view a previously approved timesheet or to go forward to the next timesheet (in the order).

This tab also provides two dropdown search fields, Year and Current Pay Period where if you jointly select the year and pay period, it jumps to the selected timesheet, so you can view it.

Once you open any previous timesheet, you can use the Current Pay Period link which serves as a "shortcut" you can click to return to your timesheet in the current pay period.

Also, Clock-Entry employees can click the Actual Time inquiry link to view a list of their actual clock times.



Employees use the Time Detail tab to view current and previous timesheets, to view or record time blocks and to view a summary of hours worked.
Below the calendar is a Summary section that shows the total Worked Hours for each day along with a breakdown of the hours worked by assignment and by earn code (regular pay, vacation, sick, overtime, shift, etc.). It also provides a Weekly and Period Total.

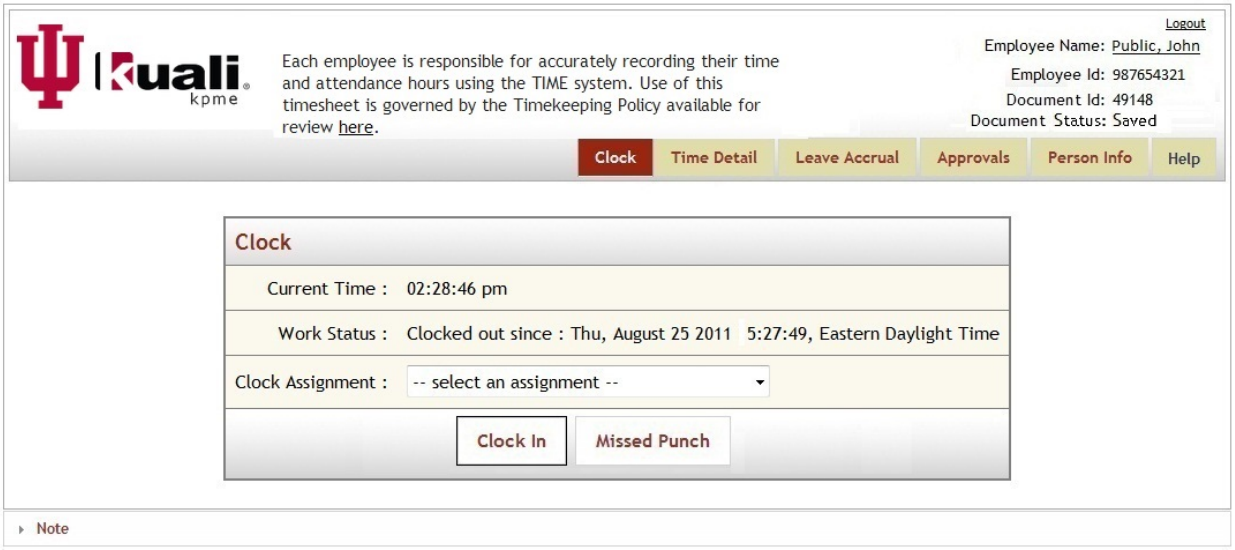
If you work more than one time assignment; they are color coded, so you can see the time blocks and hours that you have accumulated under each assignment.

An Earn Code is a classification of earning that represents the hours worked or some special earning like shift time, sick time or overtime. An Assignment is a unique combination of your Job, Job Number, and Work Area (and Task), and is used to record the hours that you work.

The bottom of the timesheet (on both the Clock tab and the Time Detail tab) contains a Note section, which allows you, your approvers and administrators to add and save notes on the timesheet. The Time Detail tab also includes a Route Log section that allows you to view the approval routing for your timesheet.

Clock-Entry Timekeeping

Employees with Clock-Entry assignments use the Clock tab to clock in and out. When you login to Kuali Time, your timesheet will open on this tab.


Logout
Kuali kpme
Each employee is responsible for accurately recording their time and attendance hours using the TIME system. Use of this timesheet is governed by the Timekeeping Policy available for review here.
Employee Name: Public, John
Employee Id: 987654321
Document Id: 49148
Document Status: Saved
Clock
Time Detail
Leave Accrual
Approvals
Person Info
Help
Clock
Current Time : 02:28:46 pm
Work Status : Clocked out since : Thu, August 25 2011 5:27:49, Eastern Daylight Time
Clock Assignment : -- select an assignment --
Clock In
Missed Punch
Note

Let's review the fields and buttons available on this tab page:

The "Current Time" field shows you the current clock Time.

The "Work Status" field shows you the last clock action you recorded on your timesheet (clocked in/clocked out), and the date and time of that action.

The "Clock Assignment" field will show you a list of your current assignments so you can select the specific Assignment you are going to clock in on. If you only have one assignment, or are already clocked in there won't be an assignment dropdown.

An Assignment (or Clock Assignment) is a unique combination of your Job, Job Number, Work Area (and if applicable, Task), and is used to record the hours that you work.

The Clock In and Clock Out buttons allow you to clock in or out.

If you forgot to clock in or clock out, the Missed Punch button allows you to submit a missed punch document to notify your supervisor and to record the "missed punch' on your timesheet.

The Note section allows you to add a Note on your timesheet.

The Logout link (located with the "Document Header" in the upper-right hand corner of the page) allows you to log out of the system and close your timesheet.

Clocking In and Out

Clocking in:

1. Log into Kuali Time. (Timesheet opens on the Clock tab.)
2. In the Clock Assignment field, select an Assignment. (If you only have one assignment, it will already be selected.)
3. Click on Clock In button. (Work Status will then change to show you are clocked in.)

Clocking out:

1. Log into Kuali Time and click on Clock Out button. (Work Status changes to show you clocked out.)

Clocking In/Out Using a Kiosk

A kiosk is a personal computer that acts as an electronic time clock and allows employees to authenticate with a username and passphrase to login to their timesheet and clock in or out. Departments can also purchase a card reader that is paired with the kiosk and allows employees to swipe their university/employee ID cards to authenticate and clock in or out.

To clock in/out on the Kiosk:

1. Click the login button on the Kiosk screen to open the login screen.
2. Enter your username and passphrase and click the Login button. Your timesheet will open on the Clock tab.
3. In the Clock Assignment field, select an Assignment. (If you only have one assignment, it will already be selected.)
4. Click on the Clock In or Clock Out button to clock in or out.
5. After you clock in/out, click logout to close your timesheet. (That resets the Kiosk so the next person can clock.)

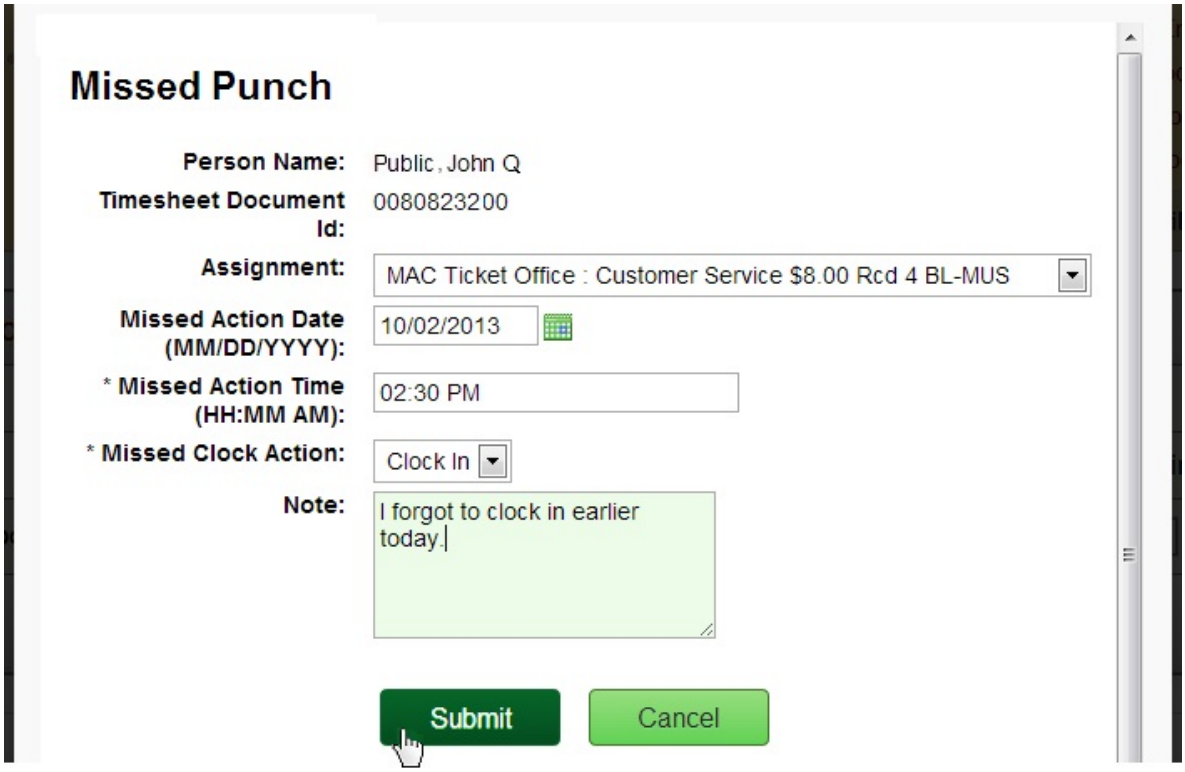
Some Kiosks may be equipped with card readers:

1. Swipe your ID card through the card reader.
2. This opens your timesheet on the Clock tab. In the Clock Assignment field, select an Assignment. (If you only have one Assignment, it will already be selected.)
3. Click on the Clock In or Clock Out button to clock in or out.
4. After you clock in/out, click Logout to close your timesheet. (That resets the Kiosk so the next person can clock.)

Adding a Missed Punch

If you missed your last clock action, you can click on the Missed Punch button to add that missed clock in or clock out to your timesheet.

This opens the Missed Punch maintenance document, where you enter your missing clock action information and submit it for approval. Once you submit this document, the missed clock action is added to your timesheet, and the missed punch document is routed to your timesheet approver for approval.



Only submit a Missed Punch document if you missed your last clock action.

Warning! Employees can submit one Missed Punch document per Time Block, but it cannot be more than 24-hours in the past. (A Time Block consists of a clock-in and a clock-out.)

To submit a Missed Punch:

1. From the Clock tab, click on Missed Punch. This opens the Missed Punch document (and inserts your Timesheet Document ID and your Name).
2. Select the Assignment where you missed clocking in or out. (If you only have one Assignment, it is already selected.)
   Note: The Missed Clock Action field already shows the clock punch that you missed, (i.e., 'clock in' if you missed clocking in, or 'clock out' if you missed clocking out).
3. Enter the date of your missed clock punch into the Missed Action Date field. The Date format to use is: MM/DD/YYYY. You can type in the date or select it using the calendar button.
4. In the Missed Action Time field:
   a. Enter the time of your missed clock punch using the notation hh:mm. (A leading zero is added for numbers under 10.)
   b. Then enter a space followed by AM or PM. (The following examples show a correct entry: (10:54 AM 09:06 PM)
5. If applicable, use the Note field, to explain why you missed the clock punch.

6. Click Submit to enter the missed punch on your timesheet. (The document will show you it was successfully submitted. If you receive an error message, fix the item causing the error, then resubmit.)
7. Click Close to return to the Clock tab.

Correcting a Time Block Clocked on the Wrong Job

If you clock in on one job assignment, and find that you have clocked-in on the wrong assignment, you should continue to work and clock out at the end of your work period. That will record a Time Block for that assignment.

During the current pay period only, you have the ability to change the Assignment for a Time Block you recorded under the wrong assignment so it is under the correct one.

To move a clocked Time Block (and the hours worked) over to the correct Assignment:

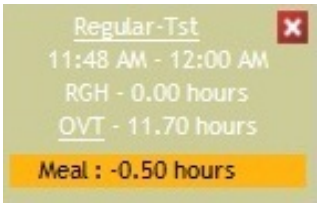
1. Go to the Time Detail tab on your timesheet.
2. Find the time block you need to change.
3. Click on the underlined Assignment link in that time block (which opens the 'Add Time Block' entry box).
4. In the Assignment dropdown, select the assignment that you actually worked.
5. Click Update.

This will update your timesheet so that Time Block (and the work hours) will show under the Assignment that you actually worked.

Viewing (and Correcting) Automatic Meal/Lunch Deductions

Some departments set up automatic lunch deduction rules for Clock-Entry employees. In those departments, all employees have to do is clock in and clock out (and work the required minimum number of hours), and the timesheet will automatically deduct the meal (whether breakfast, lunch, or dinner), usually 30 minutes (0.50 hours) or 60 minutes (1 hour).

Timesheets will show the amount of time deducted for a meal, highlighted in a yellow bar, at the bottom of a clocked time block.



Example of a 'clocked' time block that shows an automatic lunch deduction.

This image demonstrates how the automatic lunch deduction will appear to employees on a timesheet.

If an employee works through a scheduled meal or skips it for some reason, the timesheet may still show that a meal was deducted on that day.

If you are a Clock-Entry employee and work through or skip your scheduled meal break (with departmental approval), and a meal was deducted on that day, please notify your supervisor to correct your timesheet.

Time Detail Tab

The Time Detail tab is visible to all employees. Click on the Time Detail tab to open the Pay Period Calendar and view the current pay period—two weeks (14 days). (See the illustration of the Pay Period Calendar under the section, "Timesheet Overview and Navigation.")

For Clock-Entry employees, this tab allows you to view the time blocks clocked on your timesheet, to add time blocks that record any paid time off (leave) hours you are taking, and to correct (the assignment for) a time block that was accidently clocked on the wrong assignment.

You can also use this tab to view a summary of your worked hours, to add a timesheet Note, to view the Route Log (which shows who approves your timesheet), and, if applicable, to view any automatic meal deductions that were subtracted.

Additional information about these functions is provided in other sections of this manual. For help in viewing and entering your paid time off (leave) hours, please see the topics under the Section entitled, "Viewing and Entering Leave Hours."

For help with any other timesheet functions available to you, such as viewing a summary of your work hours, or adding timesheet notes, please see the topics under the Section entitled, "Other Employee Options Available in Kuali Time.

Manual-Entry Timekeeping

Employees with Manual-Entry assignments will use the Time Detail tab to manually add time blocks for the hours they work or the hours of leave they take. When you login, your timesheet will open on this tab.

Here you enter your time "In" and time "Out" which adds a Time Block to your timesheet. If you accrue benefit leave hours, you will also enter a Time Block to record the type of leave (sick, vacation, PTO) and number of "Hours" that you took. This tab also allows designated employees to add a Time Block to enter a fixed-rate dollar "Amount" (such as tips).

Adding Time Blocks to a Timesheet

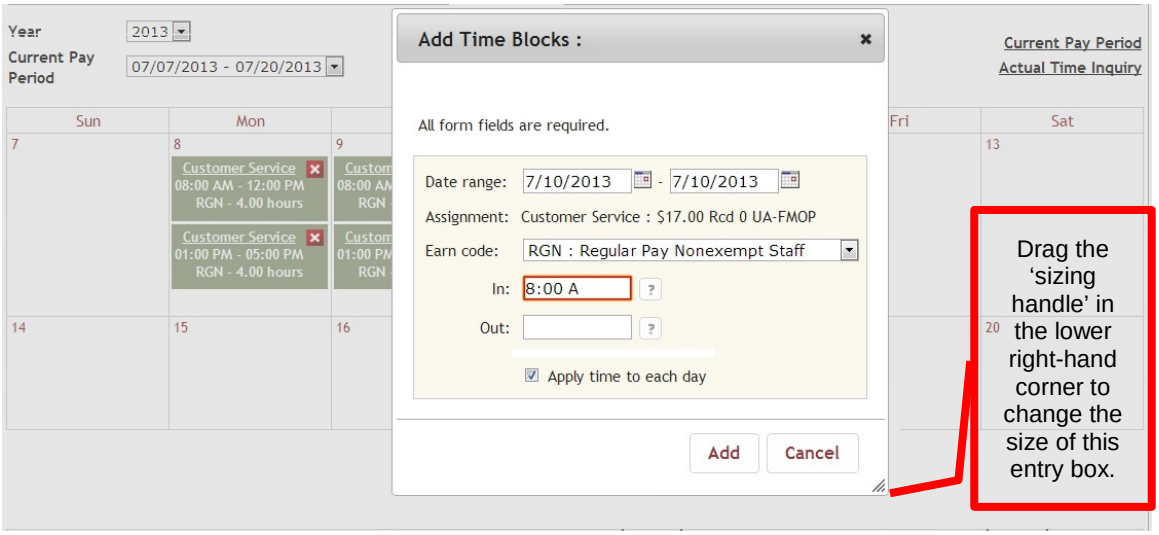
To add work hours, leave hours, or fixed dollar amounts on your timesheet, you must add a Time Block:

1. Log into Kuali Time. (Timesheet opens on the Time Detail tab.)
2. On the pay period calendar, select the day or a range of dates to add your time blocks:
    - To add a Time Block for one single day, click on the day you want to add.
    - To add the same Time Block on multiple days, such as Monday through Friday, click and hold down the (left) mouse button on the first day of your date range (Monday), and simultaneously drag the cursor over to the last day in the range (Friday), then release it.

    When you select multiple days, it highlights those days on the calendar, and the 'Add Time Blocks' entry box opens showing the range of dates you selected. For a single day entry, the 'Add Time Blocks' screen opens and shows the date range as the same day.

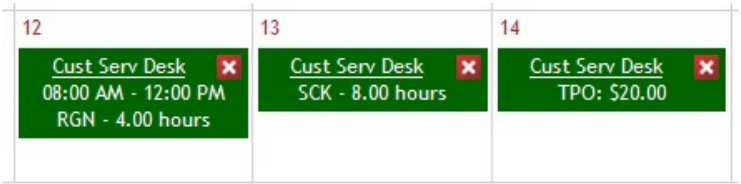
    - If you work an overnight shift, you can use the click and drag method to select your two days. But, make sure you UNCHECK the 'Apply time to each day' checkbox.
    - Once you open the 'Add Time Blocks' entry box, you also have the option to type in the date range you want or else click the calendar button located with each date field, to pop-up a monthly calendar and select your range of dates. For example, you could type in or select the date range as: 07/17/2013 to 07/19/2013.

Note: You can click and drag on the 'sizing handle' , located in the lower right-hand corner, to resize the 'Add Time Blocks' entry box.



This image shows the Add Time Blocks entry box, which opens above the timesheet calendar.

3. Verify the Date Range is correct.
4. Select the Assignment for the time block you are adding. (If you only have one Assignment, it will already be selected.) A time Assignment is a unique combination of your Job, Job Number, Work Area (and Task), and is used to record the hours that you work.
5. The Earn Code field will default to the regular pay earn code for your job (RGH, RGW, RGN, RGP, or RBP). If you need to change it, select the appropriate Earn Code from the dropdown.
6. You can enter Time Blocks on your calendar for hours you have worked, hours of leave you took, or for fixed dollar amounts:
    - If your entry is to add a time block for hours you have worked:
        a) In the 'In' box, enter the time you started working. (Roll your cursor over the Question Mark [?] button to see what entry formats this field accepts.)
        b) In the 'Out' box, enter the time you stopped working.
    - If your entry is to add a time block of Leave Hours you took (e.g., sick, vacation, PTO):
        a) In the 'Hours' box, enter the number of leave hours you are taking.
    - If your entry is to add an amount (e.g. tips, or flat rate):
        a) In the 'Amount' box, enter the fixed dollar amount (e.g. 29 or 100 or 79.75).
7. When checked, the 'Apply time to each day' checkbox will enter the same time blocks each day, for the Date Range you entered. UNCHECK this box when entering an overnight shift.
8. When finished, click Add. This adds a time block either for the hours you worked, the leave hours you took, or the fixed amount you entered.



Example of the three types of Time Blocks

This image shows time blocks entered for regular pay hours, leave hours (i.e., sick) and fixed dollar amounts (i.e., tips).

Editing Existing Time Blocks

Editing a Time Block:

1. Click on the underlined Assignment name (in the image above, you would click on 'Cust Serv Desk').
2. This reopens the 'Add Time Blocks' entry box and you can edit the Date Range, and/or the Earn Code.
3. Depending on the Earn Code you select, you may also need to edit the In and Out times, the number of Hours, or the Amount.
4. Verify whether you need to select the 'Apply time to each day' checkbox.
5. When finished with your entries, click Update.
6. Verify that your Time Blocks are correct before you exit the timesheet.

Deleting Time Blocks

To delete any Time Block from a timesheet, click on the red 'X' button in the upper right-hand corner of the Time Block. (See Time Block examples above.) When asked to confirm the deletion, click OK to delete it.

Employees can continue to edit their timesheets until it is approved by their Supervisor. If you have any questions about which Assignments or Earn Codes you should use, please contact your Supervisor.

Viewing and Entering Leave Hours

Employees in Kuali Time who are eligible to accrue paid time off can view their leave balances on the Leave Accrual tab. The Pay Period Calendar on the Time Detail tab is then used to enter time-off hours taken on the timesheet.

Viewing Your Leave Accrual Hours

If your position qualifies you to earn benefit leave (paid time off) hours such as sick, vacation or PTO, then you will have the Leave Accrual tab on your timesheet.

Accrual Category	Yearly Carryover	Hours Accrued	Hours Taken	Hours Adjust	Total Hours ?	Effective Date
Sick(50)	367.88	51.8	36.08	0	383.60	07/06/2013
Vacation/PTO Accrued(51)	253.55	124.88	61.63	0	316.80	07/06/2013
Vacation/PTO Available(5V)	253.55	124.88	61.63	0	316.80	07/06/2013
Holiday Hours(5X)	0	0	0	8	8	07/06/2013
Compensation Hours(5Y)	0	0	3.12	3.12	0.00	07/06/2013

The leave balances and yearly carry-over displayed come directly from the HRMS Payroll system, and will be updated every two weeks when the biweekly payroll is run. Since leave balances usually lag since they are computed after the end of the previous pay period, your balances may not reflect your current totals, and do not update based on usage recorded on the (current) timesheet. The Effective Date shows when the balances were last updated.

Important! 'Hours Adjust' column will populate if you accrue more hours than you are allowed to take in a year. I also populates (and may show negative hours) when you transfer hours from one leave bank to anoth (PTO to SCK, SCK to VAC), or take sick, vacation or PTO hours coded as FMLA (SFL, PFL, VFL, etc.).

Roll your cursor over the Question Mark button located in the Total Hours column, to see how the Total Hours are computed.

You will receive a warning on your timesheet if you attempt to use more than your available balance. Check with your supervisor to find out about University and/or departmental rules before going into negative balances.

Adding Leave Hours to a Timesheet

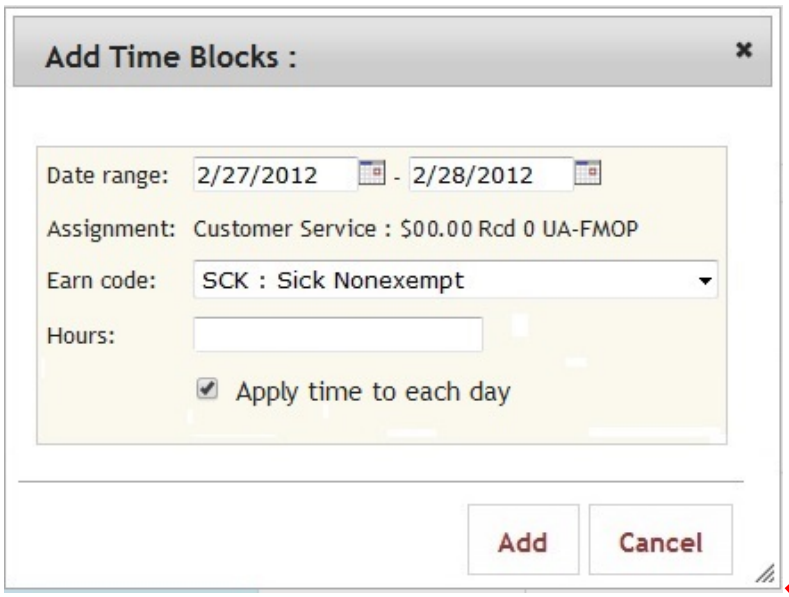
Any employee (whether Clock-Entry or Manual-Entry) who qualifies to accrue benefit Leave Hours such as paid time-off (PTO), vacation (VAC) or sick hours (SCK) will use the Time Detail tab to enter those hours.

This requires that you enter the number of "hours" to track your usage. Once the appropriate benefit earn code is selected, the 'Add Time Blocks' entry box will change to display an 'Hours' input field (instead of the usual In/Out fields).

To enter leave hours on your timesheet:

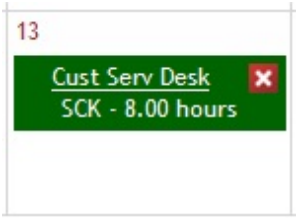
1. Log into Kuali Time (and go to the Time Detail tab.)
2. On the timesheet pay period calendar, select the day or date range on which you want to add leave hours. This will open the 'Add Time Blocks' entry box:
    - To add leave hours for one single day, click on the day you want to add.
    - To add the same number of leave hours on multiple days, go to the first day you are taking leave in the calendar, and simultaneously click and hold down your (left) mouse button and drag the cursor across the days you will be out, and then release the button. (For example, click and hold on Monday, drag cursor across to Friday, and release it, and that will enter a date range of Monday through Friday.)
    - You can also type in or select a range of dates in the Date Range fields on the 'Add Time Blocks' entry box to enter the same number of leave hours on each day. If you type in the dates, use this format: M/D/YYYY (e.g. 7/7/2013 or 10/22/2013)

Note: You can click and drag on the 'sizing handle' , located in the lower right-hand corner, to resize the 'Add Time Blocks' entry box.



Drag the 'sizing handle' in the lower right-hand corner to change the size of this entry box.

3. Select the Earn Code for the type of leave you are taking, such as SCK (sick), PTO, VAC (vacation), etc.
4. In the Hours field, enter the number of leave hours you are taking.
5. If you selected a range of dates, verify the 'Apply time to each day' checkbox, is checked so the hours you entered are applied to each day.
6. Click Add and verify that the time block(s) for your leave hours are correct on your timesheet.



Example of a 'Leave' time block.

Shows the Assignment, Earn Code that describes the type of leave (i.e., sick), and number of "Hours" of leave taken.

This image demonstrates how a 'Leave' time block will appear on a timesheet.

Editing Leave Hours on a Timesheet

Editing a leave time block:

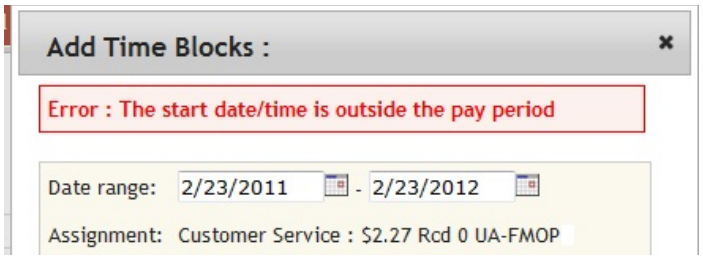
1. Click on the underlined Assignment name (in the image shown above, for example, you would click on 'Cust Serv Desk').
2. This reopens the 'Add Time Blocks' entry box and you can modify the Date Range, the leave Earn Code (VAC, PTO, SCK, CPT, etc.) or the number of Hours of leave you are taking.
3. When finished, click Update and verify that the leave time block(s) are correct on your timesheet.

Deleting Leave Hours from a Timesheet

1. To delete a leave time block from a timesheet, click on the red 'X' button in the upper right-hand corner of the time block. (See Leave time block example above).
2. When asked to confirm the deletion, click OK to delete it.

Timesheet Errors and Warnings

If an employee should input an error when adding or modifying time blocks, the 'Add Time Block' entry box will show an error message highlighted in red at the top of the box. Corrective action should be taken to fix the fields noted in the error message.


Add Time Blocks :
Error : The start date/time is outside the pay period
Date range: 2/23/2011 - 2/23/2012
Assignment: Customer Service : $2.27 Rcd 0 UA-FMOP

Possible entry errors include:

- The time or date is not valid.
- Start time and end time cannot be equivalent.
- Time entry field cannot be empty.
- Hour field cannot be empty.
- Hours cannot have more than two digits after decimal point.
- Amount field cannot be empty
- Amount cannot have more than two digits after decimal point.
- The start date/time is outside the pay period.
- The end date/time is outside the pay period.
- One time block cannot exceed 24 hours.
- The time block you are trying to add overlaps with an existing time block.

The Time Detail tab will also display error and warning messages at the top of the timesheet in red text. Most entries, such as using sick or vacation time in excess of available balances, will issue a warning.
If there are only warnings, the timesheet will advance for approval, but the warning stays on the timesheet so the Supervisor and Payroll Processor will see it during approvals.

Corrective action should be taken to fix any errors or warnings that violate University or departmental policies.

The image below shows an example of a timesheet warning:

Getting Help and Reporting Problems

The Help tab on your timesheet provides "how-to" videos if you need help in clocking in/out, or adding time blocks and leave hours. Links to online system documentation are also provided there.

If you have trouble logging on or have other difficulty with your timesheet:

1. Check with your departmental Supervisor or Payroll Processor to make sure that your Time Assignment was established.
2. If the Assignment was established and you still cannot login, verify that you logged in under the right username and passphrase.
3. If you continue to have difficulty using your timesheet, for all campuses (except IUPUI), please ask your Supervisor or Payroll Processor to contact FMS Customer Service at (812) 855-0375 or fmscustr@indiana.edu. For the IUPUI campus, please ask your Supervisor or Payroll Processor to contact the OFS Help Desk at (317) 274-3919 or ofshelp@iupui.edu.

Employees on any campus can also submit a question or problem to the Time Help Desk via the TIME Support form: http://www.fms.indiana.edu/support/support_form.asp

Other Employee Options Available in Kuali Time

Viewing Recorded Time Blocks on your Pay Period Calendar

Click on the Time Detail tab to open the Pay Period calendar and view the current pay period—two weeks (14 days). (See the illustration of the Calendar under the section, "Timesheet Overview and Navigation.")

A Document Header at the top includes your Name, Employee Id, timesheet Document Id, and shows the Document Status (Saved, Enroute, or Final).

This tab displays all the time blocks you have clocked, or manually entered, such as time blocks you added to record any leave hours that you took during the pay period. If you work more than one time assignment; they are color coded, so you can see the time blocks and hours that you have accumulated under each assignment.

There are Previous and Next buttons next to the pay period dates, that allow you to scroll back and forth to view your previous timesheets. This tab also provides two search fields, Year and Current Pay Period where if you jointly select the year and pay period, it jumps to the selected timesheet, so you can view it.

Once you open any previous timesheet, the Current Pay Period link serves as a "shortcut" you can click to return to your timesheet in the current pay period.

Clock-Entry employees also can click the Actual Time inquiry link to view a list of their actual clock times.

Viewing a Summary of Worked Hours

On the Time Detail tab, below the timesheet calendar is a section showing a Summary of the hours that you have recorded on your timesheet. This section shows you the total 'Worked Hours' for each day along with a breakdown of the hours you worked by assignment, day and by earn code (regular pay, vacation, sick, overtime, shift, etc.). It also provides a Weekly and Period Total.

Summary

	Sun 09/30	Mon 10/01	Tue 10/02	Wed 10/03	Thu 10/04	Fri 10/05	Sat 10/06	Week 1	Sun 10/07	Mon 10/08	Tue 10/09	Wed 10/10	Thu 10/11	Fri 10/12	Sat 10/13	Week 2	Period Total
Worked Hours:	0.00	15.58	0.00	0.00	0.00	0.00	0.00	15.58	0.00	9.00	9.00	9.00	9.50	9.00	0.00	45.50	61.08
RGH: Regular Pay Temporary																	
Cust Serv Desk : $16.00 Rcd 0 UA-FMOP		15.50						15.50									15.50
Bus Office : $18.00 Rcd 1 BL-CHEM		0.08						0.08									0.08
Lab : $18.00 Rcd 1 BL-CHEM										9.00	9.00	9.00	9.50	3.50		40.00	40.00
Summary Reg Pay Totals		15.58						15.58		9.00	9.00	9.00	9.50	3.50		40.00	55.58
OVT: Overtime 1.5X																	
Lab : $18.00 Rcd 1 BL-CHEM														5.50		5.50	5.50
Summary Overtime Totals														5.50		5.50	5.50

An earn code is a classification of earnings that represents regular hours worked or special type of earnings like sick time, shift or premium pay.

Regular Pay hours that contribute toward weekly overtime eligibility are totaled and displayed. Sick, Vacation or PTO hours will also appear in separate rows. Overtime or Compensatory hours, if they exist, will appear in a row below your regular pay hours. Additional pay hours, such as shift rates or premiums will appear in rows above or below that.

Changing Comp Hours to Overtime and Vice Versa)

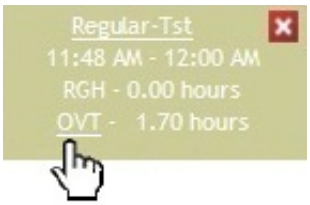
Each Department sets up rules that determine whether or not their employees earn comp time or overtime when accumulating more than 40 hours in a week.

The following five categories of paid-time off do count as part of the 40 hours in a week to determine if overtime pay is applicable: Adverse Weather (WTH), Adverse Working Conditions (ADW), Emergency Rest Time (ERT), Holiday (HOL) and Holiday Taken (HTK), and Injury with pay (INJ). If overtime is selected as the default rule when work hours exceed 40 during the Sunday through Saturday work week, those employees will qualify for overtime (OVT). If Comp Time (CPE) is set as the default rule when work hours exceed 40, then hours are added to an employee's Compensation Hours bank for use later.

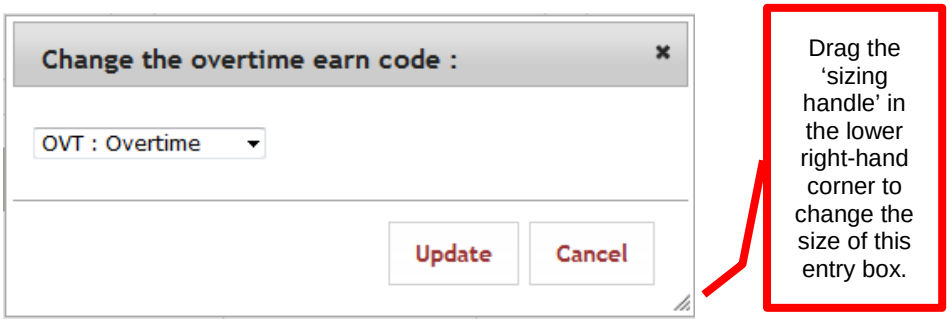
Except for the paid time-off categories listed above, paid time off, such as vacation, PTO, sick time, Income Protection, and compensatory time off, do not count as part of the 40 hours in a week to determine if overtime pay is applicable. If overtime is selected as the default rule, hours exceeding 40 during the Sunday through Saturday work week that do not qualify for overtime calculate as Non-Overtime Eligible Pay (NEP) hours (hours x regular pay rate). If Comp Time is set as the default rule when work hours exceed 40 any hours that do not qualify for overtime are added to the employee's Compensation Hours bank as NEC (No-Pay Non-Ovt Eligible Comp) for later use (hours X 1).

If your department has granted you the option to change CPE to OVT hours or NEC to NEP hours (and vice versa), then follow the steps below:

1. (If you have this option), go to the Time Detail tab, and find the Time Block you want to change.
2. Roll your cursor over the underlined earn code text of CPE, OVT, NEC or NEP in that Time Block and the cursor will change to a 'hand' cursor which indicates the underlined text serves as a link.



3. Click on that link to pop open the "Change the overtime earn code" box, then go to the dropdown field and change the earn code to the one you want, and click Update.


Change the overtime earn code :
OVT : Overtime
Update
Cancel
Drag the 'sizing handle' in the lower right-hand corner to change the size of this entry box.

The hours will update to that earn code in the Time Block and on the timesheet (hours) Summary.

Notifying Your Timesheet Approvers

Employees without access to e-mail or immediate access to their timesheet Approvers (Supervisors) can go to the Person Info tab on their timesheet and send an e-mail message to report a problem or convey other work-related information.

To send an e-mail to your approver(s):

1. Open your timesheet and go to the Person Info tab.
2. Click on the 'Your Jobs' section to open it.
3. Click anywhere on the sentence, "Click to expand assignments." This shows details about your time assignments and the names of your timesheet Approver(s), Payroll Processor(s), and Department Administrator(s) are listed there. (Timesheet Approvers are usually your direct Supervisors.)
4. Click on the underlined Name of one of your Approvers.
5. If that opens an Internet Explorer Security window, click the Allow button. (Otherwise, skip to the next step.)
6. This opens a blank email screen (in Outlook) already addressed to your Approver. Type in the subject and message you wish to send.
7. When finished, click Send.

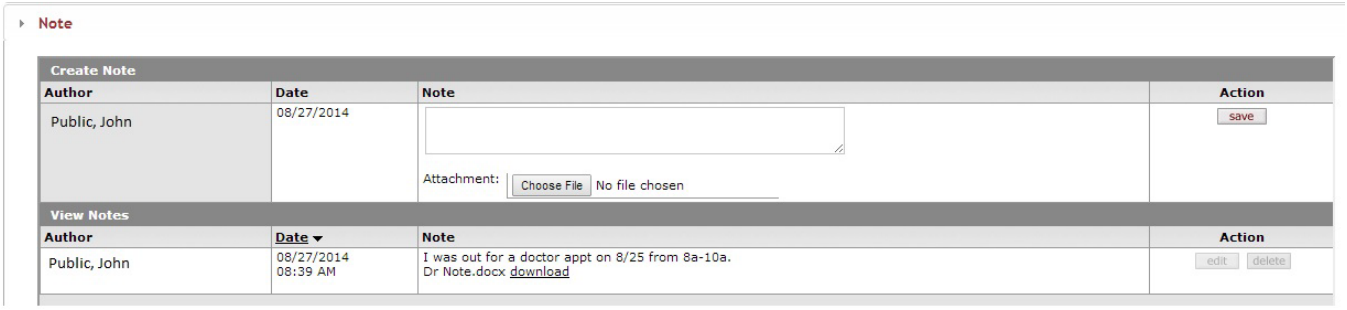
Adding a Timesheet Note

Anyone with access to a timesheet (employee, supervisor, payroll processor, reviewer, or administrator) can enter a note in the Note section.

The Note section is located at the bottom of the page on both the Clock tab and the Time Detail tab.

To add the first note, open the Note section, click 'add notes' and the notes entry page will appear. You can also attach documents and images as desired. Be sure to click save on the notes line to save your note. Notes are saved in the Kuali Rice (Workflow) system which also routes the timesheet documents for approval.

1. Click on the Note section to expand it.
2. To add the first note, click the Add Note button in that section.
3. In the Note textbox that appears, type a note and click Save.



Once a note has been added, the timesheet displays that note and provides a blank textbox where you can enter and save a new note.

Since corrections/additions to timesheets are made based on these notes, the “edit” and “delete” buttons on saved notes have been disabled. To maintain the integrity of the notes, you will need to add a new note with any corrections.

You can also add an attachment, such as a Word, Excel or email file to a note:

1. In the 'Attachment' field just below the Note textbox, click the Browse... button.
2. If you are using Internet Explorer, this opens the 'Choose File to Upload' dialog box. If you are using Firefox, this opens the ‘File Upload’ dialog box. If you are using Chrome, this opens the ‘Open’ dialog box. Select the name of a file to upload and click Open.
3. Verify the Attachment field shows the selected file is ready to upload, then click Save. The title of the file you attached will appear next to a download link.

If you click the download link, it allows you or others, such as your timesheet approvers to view the attached file.

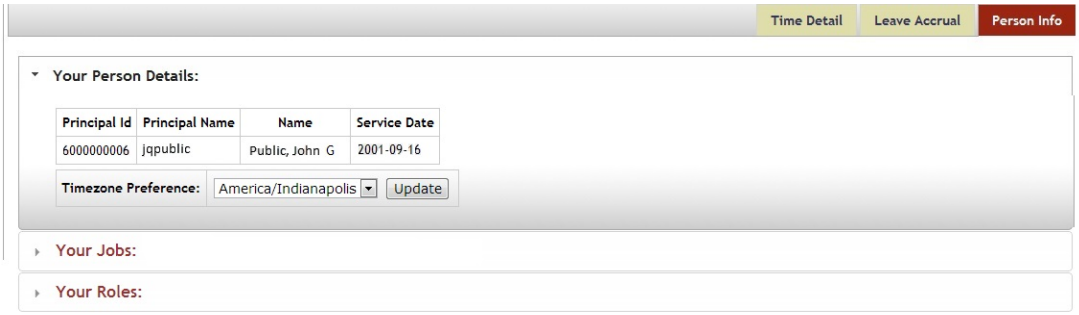
Warning! In the timesheet Notes, do NOT enter text or attach a document that contains sensitive information such as SSN’s or HIPPA-related data.

Viewing the Route Log

Click on the Route Log section to open that section and view the approval routing for your timesheet.

Viewing Jobs, Assignments or Roles

Open the Person Info tab on your timesheet to view details about your person, job and roles



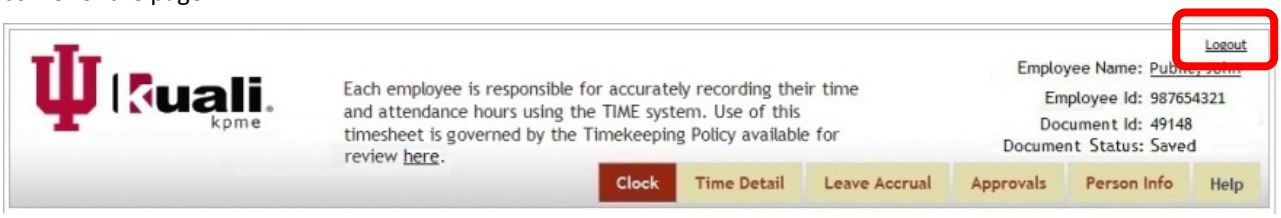
The “Your Person Details” section shows your Name, Employee Id number (Principal Id), Username (Principal Name) and Service Date.

The “Your Jobs” section is a reference tool that shows you what Jobs and Time Assignments you have, including your Job Number, Department, Work Area, Task (if applicable) and the name of your timesheet approver(s). It includes active links you can click that allow you to send an email to your approver(s) to notify them of an issue or to ask questions.

The “Your Roles” section is a reference tool that shows if you have any Kuali Time approver, payroll processor, administrative or view-only roles.

Logging Out

To log out of the system and close your timesheet, click on the Logout link located at the upper right-hand corner of the page.



Approver Options

This section discusses the key tasks that Time Approvers (also called Supervisors) and Payroll Processors can perform in the Kuali Time system, such as approving Missed Punch documents, approving timesheets, adding/modifying Time Blocks, adding Notes to a timesheet, or viewing Route Logs.

Overview of the Approvals/Payroll Processor tab

When you log into the system as a Supervisor you have the Approvals tab; as a Payroll Processor you have the Payroll Processor tab. These tabs are identical in function, and if you have both roles, you will have both tabs.

Each of these tabs opens the ‘monitor and approval’ page (which acts as your Action List) and provides a “one-stop” portal for approvers to monitor, clean-up and approve timesheets. The Pay Period heading on the tab will show what pay period you are in.

You can ‘sort and filter’ your Action List of timesheets to view them by Department and then by Work Area or sort “enroute” timesheets by Approval Status to view which ones are ready for approval.

You can ‘search by’ the employee’s Principal ID, Principal Name, or Last Name and by the timesheet Document ID number to find a specific timesheet (in that Pay Period).

You can monitor a Clock-Entry employee’s work status (in real-time), and If one of your employees fails to clock out after 12 hours, the cell with their Name is shaded in red to flag it for your attention. You can also open ‘quick views’ of any Notes and Warnings present on your employee’s timesheets, so you are aware of any issues or time entries that may need to be corrected.

When necessary, you can click on the Document Id number and open that employee’s timesheet to clock them in/out, to submit a Missed Punch document that records a missed clock action, to enter Time Block corrections, and to delete an automatic meal deduction when the employee did not take one.

You can use the Plus and Minus buttons in the 'Name' column of your Action List, to pop-open (and close), a "summary view" of the hours worked by that employee to monitor their daily hours, or to review their daily, weekly and total pay period hours (by Assignment) when you are ready to approve that timesheet.

The page provides two other search fields, Year and Current Pay Period. Once you select a specific Year and Pay Period from the dropdown list, the system jumps directly to that set of historical employee timesheets.

In addition, there are Previous and Next arrow buttons located on each side of the Pay Period heading that allow you to scroll back and forth through each set of historical timesheets by Pay Period, in sequential order.

These search tools allow you to find and open any historical timesheet and review the recorded Time Blocks, hours, (and approvals) for that employee.

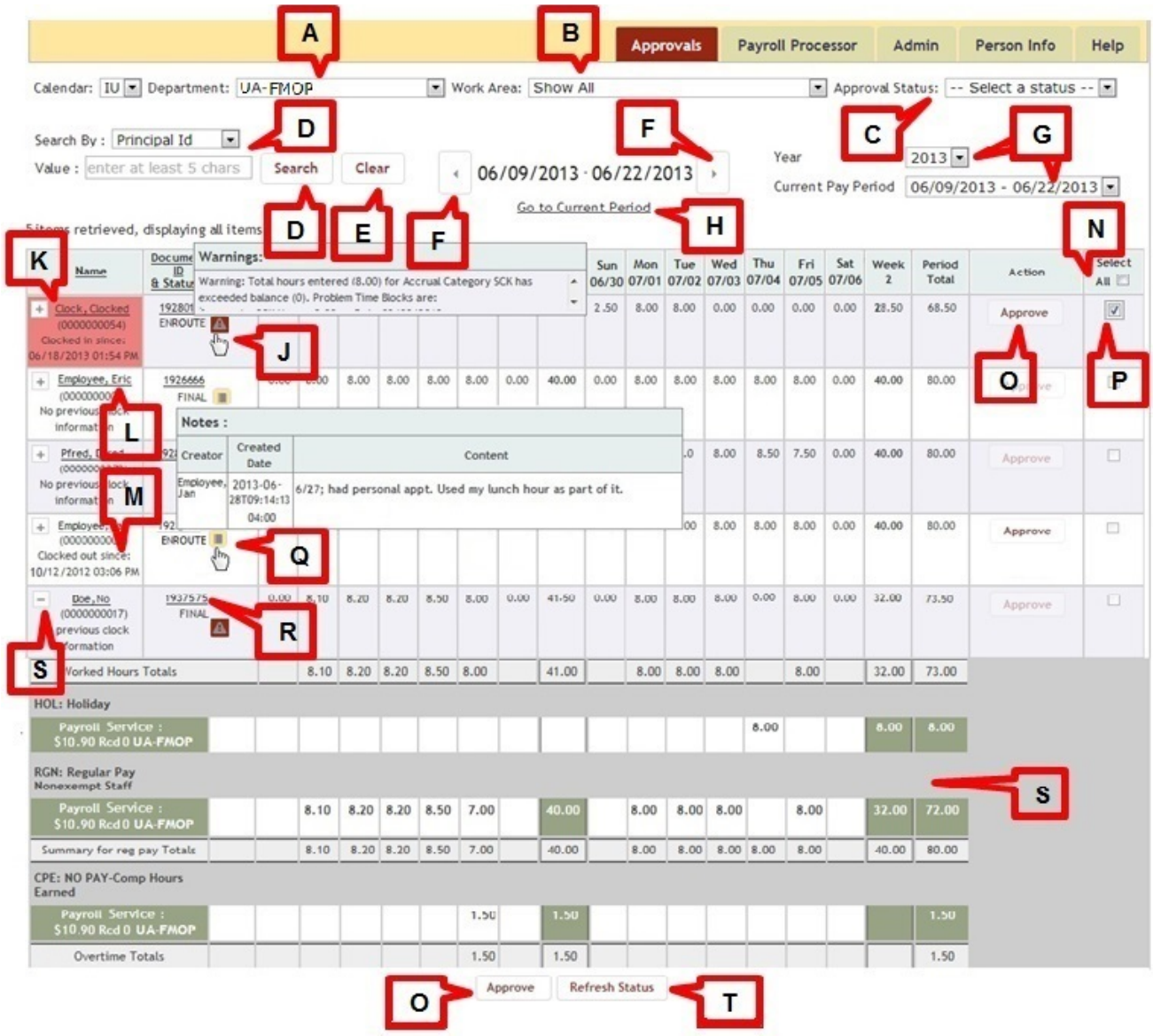
Once you leave the current Pay Period, a Go to Current Period link will appear, and serves as a "shortcut" you can click to return to the same set of employee timesheets in the current pay period.

If you click on an employee's Name in your Action list, it opens the Person Info tab and you can view the jobs, assignments and Kuali Time roles held by that employee.

If you are a Supervisor, you should check your Action List notification emails during each Pay Period to 'Approve' or to 'Correct and Approve' any Missed Punch documents routed to you. These documents inform you of any missed clock actions by the employees you supervise, and you can review each one and, if applicable, correct any submitted with an inaccurate clock in or clock out time before you approve it.

Finally, at the end of each Pay period, Supervisors and Payroll Processors each must approve timesheets.

The Action List 'monitor and approval' page provides you the option to approve an individual timesheet or do bulk approvals. The hours on a Final timesheet are then processed and sent to the HRMS Payroll system.



Note: This image presents all the tools available on the Approvals/Payroll Processor tab and is intended only to demonstrate those tools. Please note you will only be able to open and view one set of timesheet Notes or Warnings at a time.

Let's look's at the tools available to you on the Approvals tab or Payroll Processor tab. You can:

A Select a specific Department from the dropdown list at the top of the page to view all the employee timesheets for that department.

B (After selecting a Department), select a specific Work Area from the dropdown list at the top of the page, to view the timesheets for that work area.

C Click the Approval Status button to show you a list of timesheets that are ready to approve (Approvable) vs. the ones that are not ready to approve (Unapprovable).

D Search for a specific timesheet in that pay period, by Principal ID, Principal Name, Last Name or by Document ID. In the 'Search By' field, select 'Principal ID,' 'Principal Name,' 'Last Name,' or 'Document ID' from the dropdown, then enter the specific Name or ID number of the employee or timesheet you want to find in the 'Value' field and click Search.

E Click the Clear button to clear out results from a sort or search on your action list of timesheets.

F Click the Previous or Next arrow buttons to view the previous (or next) set of timesheets (for your employees) in sequential order, by pay period.

G Search for historical employee timesheets by year and then pay period, by using the Year field jointly with the Pay Period field.

H Click on the Go to Current Period link to jump from a previous timesheet back to the one for the current pay period.

J Roll (and hold) your cursor over the 'Warnings' button to pop open a "quick view" window that shows the warnings present on that timesheet.

K Spot employees clocked in > 12 hours, as they are flagged (highlighted) in red.

L Click on an employee's 'Name' to open the Person Info tab for that employee and view their jobs, Time assignments, and roles.

M See the current 'Work Status' of clock-entry employees.

N Select all of the 'ready to approve' timesheets on that page by clicking the "Select ALL" checkbox (at the top of the column).

O Click the Approve button to approve timesheet(s). The Approve button at the bottom of the page allows bulk approval of all the timesheets you have selected. If you select only one timesheet to approve, you will use the Approve button for that specific timesheet, located on the right side of the page in the 'Action' column.

P Select an individual timesheet as 'ready to approve,' by clicking the "Select" checkbox.

Q Roll (and hold) your cursor over the 'Notes' button to pop open a "quick view" window that shows the notes entered on that timesheet

R Click on the 'Document ID' of the timesheet, to open that employee's timesheet.

S Click on the 'Plus' button by an employee's name to open a "summary view" beneath that row so you can see the hours that employee recorded by Assignment. Click the 'Minus' button to close the summary.

T Click the Refresh Status button to refresh the current status of the timesheets you are viewing.

Monitoring, Reviewing and Correcting Timesheets

During the Pay Period, and before timesheets are routed for approval, you can go to the Approvals or Payroll Processor tab to open your timesheet Action List in a 'monitor, review and correction' mode. This page provides a "one-stop" portal to monitor, correct and (after routing to) approve your employee's timesheets.

Here you will see a list of timesheets that currently route to you for review and approval along with several 'sort and search' fields that allow you to sort timesheets by Department and Work Area, to find specific timesheets, or to filter enroute timesheets by Approval Status.

Timesheets are accessible to you throughout the pay period which allows you to monitor employee status in real-time, to catch employees who are clocked-in greater than 12 hours, and if warranted, to open and edit specific timesheets to enter corrections.

The Work Status of clock-entry employees (clocked in, clocked out) is shown, along with the status of each timesheet (saved, enroute, or final).

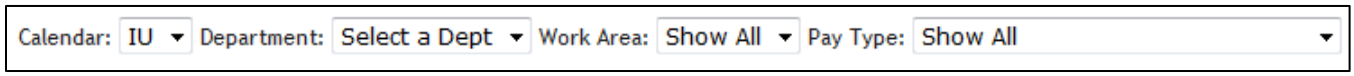
You can roll your cursor over icons that open up "quick views" of Notes and Warnings, and clickable icons are provided to open (and close) a brief summary view that shows all hours and dollar amounts recorded, by Assignment, on an employee's timesheet.

When a timesheet or set of timesheets are ready to approve, you will use the Approve buttons on these tabs to do your approvals. Once a timesheet is fully approved (Final), the information is then processed and extracted to the HRMS Payroll system.

Sorting Timesheets by Department and Work Area

When you open the Approvals or Payroll Processor tab, it finds a list of all the departments in which you approve timesheets. If you approve timesheets for only one department, it is already defaulted in the Department field.

Use the 'sort and filter' fields (see illustration below) to sort timesheets by Department and then to filter the list down by Work Area so you see only those timesheets for the employees in that work area. Additionally, you can focus on specific paygroups by selecting a Pay Type filter.



1. Log in to Kuali Time and go to the Approvals or Payroll Processer tab.
2. Select the Department you wish to view from the Department dropdown. That displays a list of timesheets you can monitor, review, (and at the end of the pay period) approve. Note: It may take the system several seconds to find all of your timesheets—the bar at the bottom of the page will show, "waiting for response from iu.edu…" while this search occurs.
3. You can use the Work Area field to filter and view your timesheets by a specific work area. Select the Work Area you want to view in the Work Area dropdown.
4. Filtering by Pay Type can provide easy access to your different pay groups within work areas.

Important Note! Filtering by Pay Type may return timesheets for employees who have a job in that paygroup in a different department. Your results will only return the timesheets for jobs in your department but may be of a different pay type than the Pay Type filter identifies. Example: Bob Hoosier has two jobs with IU, a BW1 with UA-FMOP and a HRR with BA-ATHL. The UA-FMOP payroll processor will return Bob's UA-FMOP BW1 timesheet when filtering by HRR Pay Types.

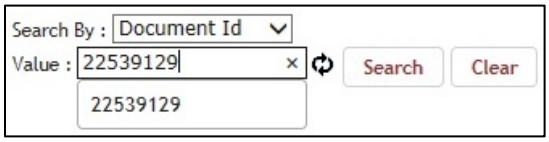
The system will find the timesheets you specified. If there are no timesheets found for that Department or Work Area, you will see the message, "No values match this search." on the page.

5. To clear out the search results and return to a list of all your timesheets, click the Clear button.

Searching for Specific Timesheets

You can use the 'search by' fields on the Approvals or Payroll Processor tab to search for a specific timesheet in that Pay Period by an employee's Principal ID (University ID), Principal Name (Username), Last Name, or timesheet Document ID.

1. In the Search By field, select the parameter you wish to search by and in the Value field, enter the specific name or number you want to find. , then click Search. You must enter at least 5 characters to start a search (unless the Principal Name or Last Name is less than that.)
2. The system searches to find this value (and you may briefly see a black circle spinning next to the Search button). Any matches found will display in a dropdown box under the Value field. In that dropdown box, click on the ID number or name to select it.

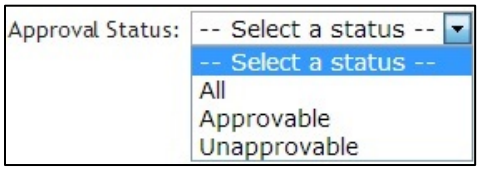


This finds the timesheet for the value you selected. If the search fails to find a matching value, you will see the message, “No values matching this search.” on the page.

3. To clear out the search results and return to a list of all your timesheets, click the Clear button.

Sorting Timesheets by Approval Status

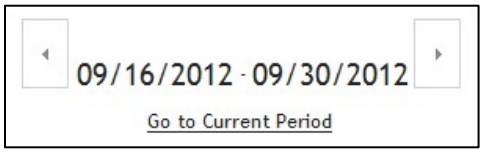
Once timesheets have routed for approval in that Pay Period, you can use the Approval Status field on the Approvals or Payroll Processor tab to sort the list of timesheets in your Action List. You can sort by documents that are ready to approve, by those that have a problem and can’t be approved, or reset the page to view all.



1. In the Approval Status field, select the parameter you wish to sort by, ‘Approvable,’ or ‘Unapprovable.’
2. To clear out the search results and return to a list of all your timesheets, click the Clear button.

Viewing Previous and Next Timesheets

On the Approvals or Payroll Processor tab, you can click on the Previous or Next buttons (located on each side of the Pay Period dates) to view the same set of employee timesheets, by pay period.



All historical timesheets have been converted to the Kuali Time system, so you can use these buttons to scroll back and forth and view previously approved timesheets, in chronological order, for your employees.

You can click on the Go to Current Period link as a “shortcut” to return to the current pay period.

Viewing Timesheets by Year and Pay Period

On the Approvals or Payroll Processor tab, you can use the Year and Current Pay Period fields jointly, and select a year and then a pay period in that year, to jump directly to that set of employee timesheets.

You can click on the Go to Current Period link as a "shortcut" to return to the current pay period.

Returning to the Current Pay Period

If you leave the current pay period (timesheet) Action List to view any previous, future or historical timesheets, you can click on the Go to Current Period link as a "shortcut" to return to the current pay period.

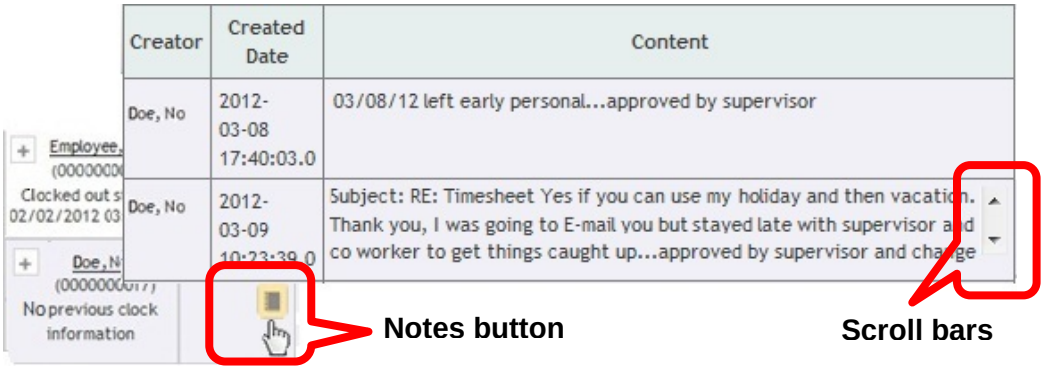
Viewing Timesheet Warnings and Notes

You can view the Warnings and Notes entered on a timesheet without having to open it. The Action List of timesheets (on the Approvals or Payroll Processor tab) provides special 'roll-over' buttons that appear (next to or under the Document ID number) whenever that timesheet contains any Warnings or Notes.

When you roll (and hold) your cursor over either one of these special buttons, it will pop-up a 'quick view' window of any Warnings or Notes on that employee's timesheet.

To view Notes:

1. Log into Kuali Time and go to the Approvals tab or Payroll Processor tab.
2. To open the Notes "quick view" window for a timesheet, roll (and hold) your cursor over the Notes button.


Creator
Created Date
Content
Doe, No
2012-03-08 17:40:03.0
03/08/12 left early personal...approved by supervisor
Doe, No
2012-03-09
Subject: RE: Timesheet Yes if you can use my holiday and then vacation. Thank you, I was going to E-mail you but stayed late with supervisor and co worker to get things caught up...approved by supervisor and change
No previous clock information
Notes button
Scroll bars

3. If a Note contains several lines of text, move your cursor onto the 'quick view' window, and use the scroll bars located on the right to scroll up and down and read the entire Note.

To view Warnings:

1. Log into Kuali Time and go to the Approvals tab or Payroll Processor tab.
2. To open the Warnings "quick view" window for a timesheet, roll (and hold) your cursor over the Warnings button.

3. If a Warning contains several lines of text, move your cursor onto the 'quick view' window, and use the scroll bars located on the right to scroll up and down so you can read the entire Warning.

Viewing Employee Work Status

The Name column on the timesheet 'monitor and approval' page shows the name of each employee, their University Id, and if they are a Clock-Entry employee, it shows their current Work Status. The current Work Status for a Clock-Entry employee appears just under their Name and Principal ID.

During the Pay Period you can view the current work status of Clock-Entry employees. This allows you to monitor your employees in real-time during the Pay Period, and spot any employees who failed to clock out.

Spotting employees clocked in > 12 hours

In this example, you can see that the first employee is clocked out, while the second one is clocked in.

The third employee's 'Name' cell is flagged (highlighted in red), which indicates it's been more than 12 hours since the employee clocked-in.

This allows you to spot an employee who missed a punch out, so you can contact them to submit a Missed Punch document to record their missed clock out.

You also have the option to submit a Missed Punch document for this employee to record their missed punch on the timesheet.

Refreshing Employee/Timesheet Status

At the bottom of the 'monitor and approval' page there is a Refresh Status button. When you click that button, it updates the current work status of the employees and their timesheets.

Opening and Closing the 'Summary View' of Employee Hours

On the Approvals or Payroll Processor tab, you can open (and close) a 'summary view' of the hours that an employee recorded on their timesheet.

This "summary view" is the same as the hours Summary located on the employee's Time Detail tab. Both will show you the total 'Worked Hours' for each day along with a breakdown of the hours worked by Assignment, day and by earn code (regular, vacation, sick, overtime, shift, etc.). It also provides a Weekly and Period Total.

1. Log into Kuali Time and go to the Approvals tab or Payroll Processor tab.
2. To open the "summary view" for an employee, click the 'Plus' button (by employee's name).

Doe, No (0000000017) No previous clock information	1937575 FINAL	0.00	8.20	8.20	8.50	8.00	8.00	0.00

This opens, just beneath that row, the "summary view" of worked hours by the employee.

HOL: Holiday																
Customer Service : $10.00 Rcd 7 UA-FMOP					8.00	8.00		16.00								16.00
RGN: Regular Pay Nonexempt Staff																
Customer Service : $10.00 Rcd 7 UA-FMOP		8.20	8.20	7.60				24.00		8.00	8.00	8.00	8.00	8.00	40.00	64.00
Regular Pay Totals		8.20	8.20	7.60	8.00	8.00		40.00		8.00	8.00	8.00	8.00	8.00	40.00	80.00
CPE: NO PAY-Comp Hours Earned																
Customer Service : $10.00 Rcd 7 UA-FMOP				0.90				0.90								0.90
Overtime Totals				0.90				0.90								0.90

3. To close the "summary view," click the 'Minus' button (by employee's name).

Note: You can open the 'summary view' of hours worked for more than one employee at a time.

Opening a Timesheet

To view an employee's timesheet or to enter corrections, you can open it from your action list of timesheets on the 'monitor and approval' page.

1. Log into Kuali Time and go to the Approvals tab or Payroll Processor tab.
2. Use the 'sort and filter' or 'search by' fields to find the timesheet you want to open.
3. Click on the underlined Document ID number. That opens the employee's Pay Period calendar on the Time Detail tab. (The calendar header is clearly marked to indicate you are working on an employee's timesheet.)

   Here you can review or edit any Time Blocks recorded by this employee (on the Assignments you have access to), or click on other tabs to view the employee's Leave Accruals, Person Info, or last Clock action.

   For clock-entry employees, you could go to the Clock tab, and clock an employee in/out, or submit a Missed Punch document to record a missed clock action. You will only see the Assignments you have access to view.
4. To close the (timesheet) calendar for this employee, click the Return button at the top of the page. This returns you to the 'monitor and approval' page on the Approvals tab or Payroll Processor tab.

Adding a Time Block to a Timesheet

To add work hours, leave hours, or fixed-rate dollar amounts to an employee's timesheet, you must add a Time Block:

1. Log into Kuali Time and go to the Approvals tab or Payroll Processor tab.
2. Use the 'sort and filter' or 'search by' fields to find the timesheet you want to open.
3. Click on the underlined Document ID number. That opens the employee's timesheet calendar on the Time Detail tab.
4. On the Pay Period calendar, select the day or date range on which to add the Time Blocks:

    - To add a Time Block for one single day, click on the day you want to add.

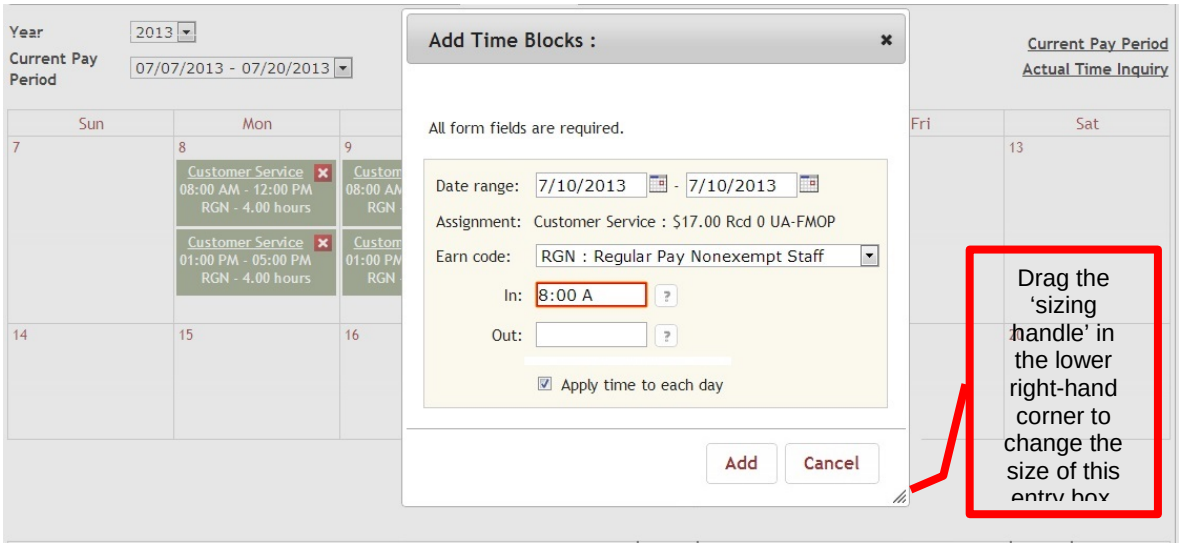
    - To add the same Time Block across multiple days, such as Monday through Friday, click and hold down the (left) mouse button on the first day of your date range (Monday), and simultaneously drag the cursor over to the last day in the range (Friday), then release it.

    When you select multiple days, it highlights those days (in blue), and the 'Add Time Blocks' entry box opens showing the date range you selected. A single day entry, just opens the 'Add Time Blocks' screen with the date range showing as the same day.

    - If the employee works an overnight shift, you can use the click and drag method to select both days in the shift. But, you must UNCHECK the 'Apply time to each day' checkbox.

    - Once the 'Add Time Blocks' entry box is open, you also have the option to type in the date range or click on the calendar button beside each date field, to pop-up a monthly calendar and select the range of dates. For example, you could type in or use the calendar button to enter a date range such as: 07/17/2013 to 07/19/2013.

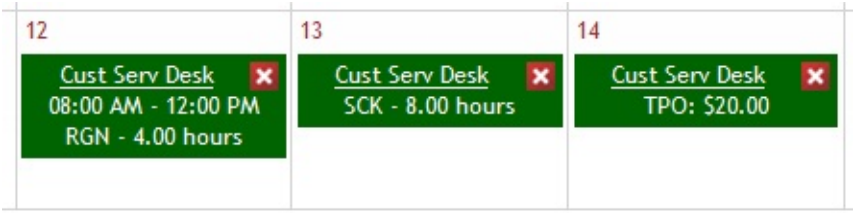
Note: You can click and drag on the 'sizing handle' , located in the lower right-hand corner, to resize the 'Add Time Blocks' entry box.



This image shows the Add Time Blocks entry box, which opens above the timesheet calendar.

5. Verify the Date Range is correct.
6. Select the Assignment for the time block you are adding. (If the employee has only one Assignment, it will already be selected.) You will only be able to select the Assignments that you have access to. A time Assignment is a unique combination of Job, Job Number, Work Area (and Task), and is used to record the hours that an employee works.

7. The Earn Code field will default to the regular earn code for the employee's job (RGH, RGW, RGP, RGN, or RBP).
    - If you need to change it, select the appropriate Earn Code from the dropdown list (such as ABS, SCK, VAC, PTO, CPT, etc.)
8. You can enter Time Blocks for regular hours worked, hours of leave time taken, or for fixed-rate dollar amounts:
    - If the entry is to add a Time Block for regular hours worked:
        a) In the 'In' box, enter the time that the employee started work. (Roll your cursor over the Question Mark, ? to see what formats are accepted by time-entry fields.)
        b) In the 'Out' box, enter the time that the employee ended work.
    - If your entry is to add a Time Block of Leave Hours being taken (e.g., sick, vacation):
        a) In the 'Hours' box, enter the number of leave hours the employee is taking.
    - If your entry is to add a fixed-rate dollar amount (e.g. tips):
        a) In the 'Amount' box, enter the dollar amount. (e.g., 65 or 55.32).
9. When checked, the 'Apply time to each day' checkbox will enter the same Time Blocks each day, for the range of dates you entered. Uncheck this box for an overnight shift.
10. When finished, click Add. This adds a Time Block either for the regular hours worked, the leave hours taken or the fixed dollar amount you entered.



Example of the three types of Time Blocks

This image shows time blocks entered for regular hours, leave hours (i.e., sick) and fixed dollar amounts (i.e., tips).

Editing Existing Time Blocks

To edit a Time Block already clocked or entered on an employee's timesheet as regular work hours, leave hours, or fixed-rate dollar amounts:

1. Use the 'sort and filter' or 'search by' fields to find the employee's timesheet you want to edit.
2. Click on the underlined Document ID number to open that timesheet on the Time Detail tab.
3. In the Pay Period calendar, click on the underlined name of the Assignment you want to edit. (In the illustration above, you would click on 'Cust Serv Desk').
4. This reopens the 'Add Time Blocks' entry box and you can edit the Date Range, and/or the Earn Code.
5. Depending on which Earn Code was selected, you can also edit the In and Out times, the number of Hours, or the Amount.
6. When finished with your editing, click Update.
7. Verify that the Time Blocks are correct before you exit the timesheet.

Deleting a Time Block

To delete a Time Block already clocked or entered on an employee's timesheet:

1. Use the 'sort and filter' or 'search by' fields to find the employee's timesheet you want to edit.
2. Click on the underlined Document ID number to open that timesheet on the Time Detail tab.
3. To delete a Time Block from the Pay Period calendar, click on the red 'X' button in the upper right-corner of that Time Block. (See the Time Block illustration above.)
4. When asked to confirm the deletion, click OK to delete it.

Important! Employees can still edit their timesheets (after the pay period ends) until the Supervisor approves it.

Approving a Missed Punch Document

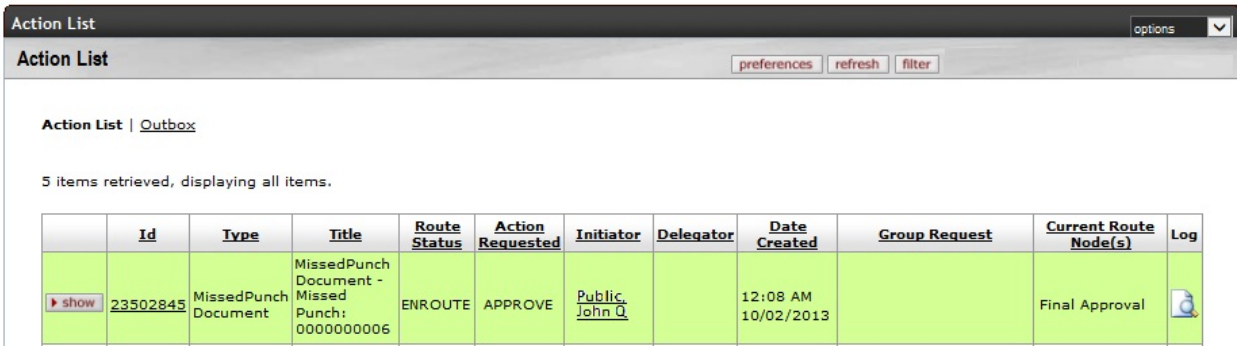
Whenever an employee submits a Missed Punch document, that document will route (just like any other Kuali Rice Workflow document such as an eDoc) to the Supervisor's OneStart Action List for approval.

The system sends the Supervisor an email notification (which you may or may not see depending on how you have set your Action List email preferences).

Each Pay Period, Supervisors should open and review every Missed Punch document in their Action list. You can approve it, or else edit the document (to correct the missed punch clock action entered by the employee) and then approve it. (Note: This document can't be disapproved.) This approval verifies the Time Block is correct and should be included in the work hours for that employee.

To approve a Missed Punch Document in your Action List:

1. In OneStart, go to your Action List and open it.



2. In the list of documents retrieved, click on the underlined Document Id of the Missed Punch document you want to review and approve. (This opens the document.)
3. Review the entries on the document to ensure they are correct. Before you approve the document, you can change the Assignment, Missed Action Date, and/or Missed Action Time fields to correct any mistakes entered for the missed punch.
4. (Optional) You can also add a Note to explain any changes you entered, or to add an attachment such as a copy of an email from the employee.
5. When finished, click Approve. (This is the only action you can take on this document.)

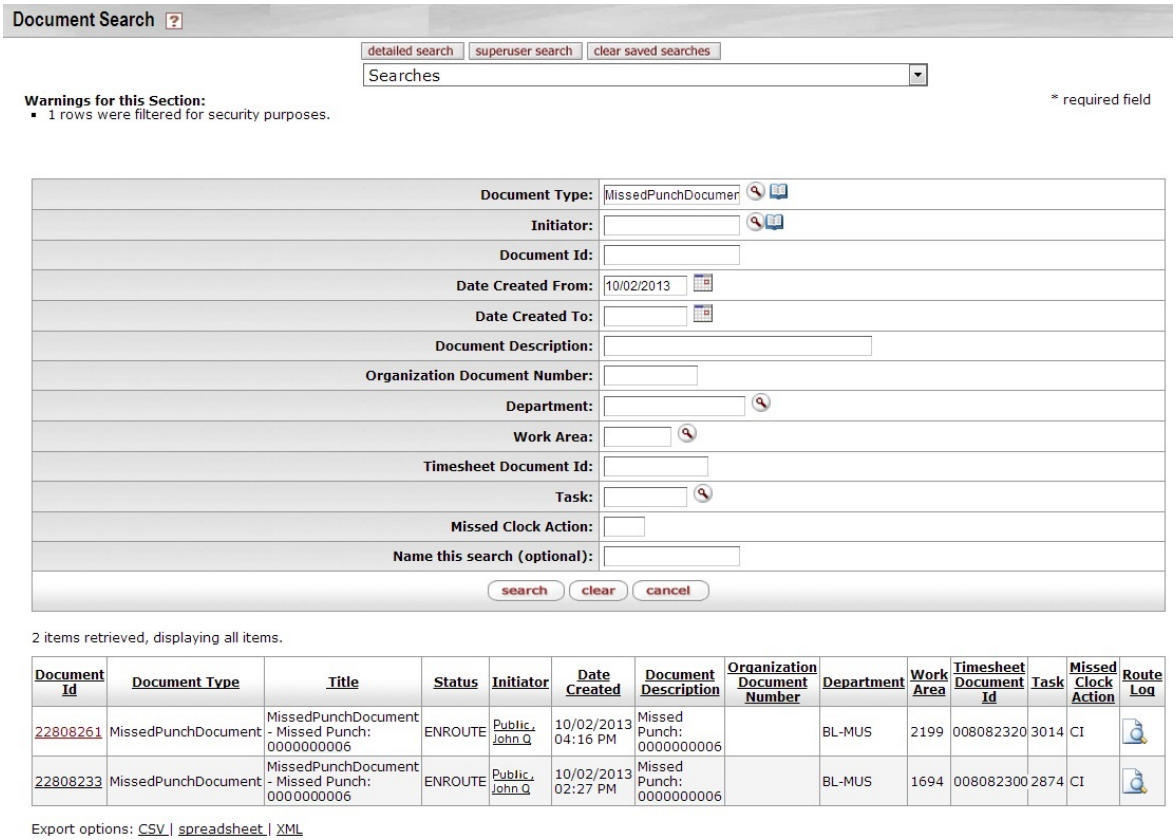
Warning! Employees can submit one Missed Punch document per Time Block, but it cannot be more than 24-hours in the past. (A Time Block consists of a clock-in and a clock-out.)

At the end of each two-week Pay Period, any Missed Punch documents, not yet approved, will be auto-approved by the system.

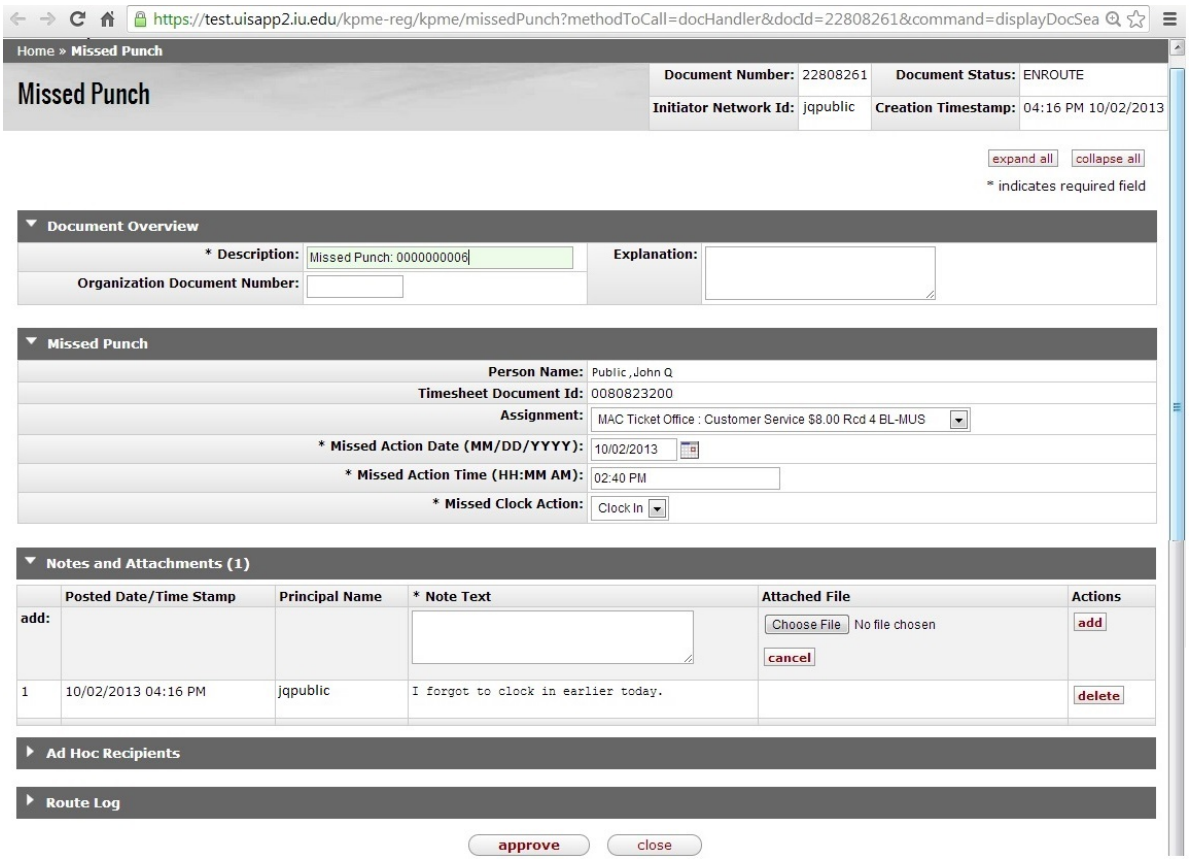
You also have the option to approve a Missed Punch document in Kuali Time.

To approve a Missed Punch Document (in Kuali Time):

1. On the Admin tab (or System Admin tab if you have that tab), under Inquiries, click on the Missed Punch Inquiry link. That opens the Document Search screen.
2. Enter enough search criteria to find results. You can enter Initiator, Document Id, Date Created From and Date Created To, Department, Work Area, Timesheet Document Id, or Missed Clock Action.
3. Click Search.



4. In the list of results retrieved, click on the underlined Document Id of the Missed Punch document you want to review and approve. (This opens the document.)



5. Review the entries on the document to ensure they are correct. Before you approve the document, you can change the Assignment, Missed Action Date, and/or Missed Action Time fields to correct any mistakes entered for the missed punch.
6. (Optional) You can also add a Note to explain any changes you entered, or to add an attachment such as a copy of an email from the employee.
    a. Enter the text of the note into the 'Note Text' input box.
    b. To add an attachment, click Choose File, and in the dialog box that opens, find the file you want to attach, and then click Open. (This uploads the file to the Missed Punch document.)

       The name of the attached file will then show in the 'Attached File' section of that note along with a download attachment link that users can click to open and view it.
    c. Click Add to save the note (and any attachments).

7. When finished, click Approve. (This is the only action you can take on this document.)
8. To close out of the document, click Close.

Adding a Timesheet Note

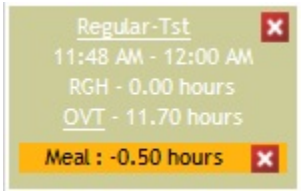
Anyone with access to a timesheet (employee, supervisor, payroll processor, reviewer, or administrator) can enter (and view) a note in the Note section accessible at the bottom of both the Clock tab and Time Detail tab. These users can also attach a file as an Attachment within a Note.

Please go to the topic heading entitled, "Adding a Timesheet Note" under the employee section of this manual for detailed steps on how to add a Note and how to attach a file as an Attachment within a Note.

Deleting Automatic Meal Deductions

Departments have the option to set up automatic lunch (meal) deduction rules for Clock-Entry employees. Once a rule become effective, all employees have to do is clock in and clock out (while working the minimum number of hours required for this deduction), and the timesheet will automatically deduct the meal (whether breakfast, lunch, or dinner), usually 30 minutes (0.50 hours) or 60 minutes (1 hour).

Timesheets will show the amount of time deducted for a meal, highlighted in a yellow bar, at the bottom of a clocked time block.



Example of a 'clocked' time block that shows an automatic meal deduction.

If an employee works through a scheduled meal, or works a shorter shift (usually 6 hours) that qualifies for an automatic deduction without taking any meal break, you can delete the automatic meal deduction and the timesheet will credit those minutes back to the employee's timesheet as work hours.

To remove an automatic lunch or meal deduction:

1. On the Approvals or Payroll Processor tab, find the timesheet for that employee.
2. Click on the Document Id of the timesheet to open it and go to the Time Detail tab.
3. Find the Time Block showing the lunch or meal deduction that needs to be deleted.
4. In the yellow bar showing the number of minutes being deducted for the lunch or meal, click on the red 'X' button.

That will delete the lunch or meal deduction and add those minutes back as work hours on the timesheet.

Viewing Employee Jobs, Assignments and Time Roles

From the 'monitor and approval' page, you can view an employee's jobs and time assignments, and see if they have any roles in Kuali Time, such as Approver or Department Administrator.

This opens the Person Info tab for that employee and shows their Principal Id (University Id) and Principal Name (Username).

1. To view an employee's job(s), time assignment(s) or role(s), click on the Name of the employee.
2. This opens the Person Info tab for that employee.
    - Click on the Jobs section to view details about the employee's job and time assignments.
        - Click on the 'Click to expand assignments' text to view the employee's assignments.

- Click on the Roles section to view what roles the employee has in Kuali Time.

3. Click the Return button (at the top of the page) to return to your 'monitor and approval' page.

Adjusting Shift Differential Hours

Approvers or Payroll Processors may have to adjust shift differential hours for Manual-Entry employees working an overnight shift that starts in one pay period, but ends in the next pay period (e.g., 11 PM to 7 AM), because the Minimum Hours (for shift pay) will not be met before the end of the first Pay Period.

Adjusting Overtime Hours for Work Study Employees

Employees in Work Study jobs do NOT earn regular overtime when they work more than 40 hours per week. If a timesheet for a Work Study employee shows overtime (OVT), look at the total number of hours the employee worked. Then, edit the timesheet so the regular pay hours total 40, and manually enter any additional hours worked (over 40) under the OVW (Overtime Workstudy) earn code.

Please contact the Payroll Processor in Payroll, who is assigned to assist you if you have any questions about entering work hours for work study employees.

Timesheet Approval and Routing

This section explains how timesheets are routed for approval, briefly reviews issues that might prevent you from approving a timesheet, and explains how to approve one timesheet or multiple timesheets.

Employee Approvals

Employees do not need to approve their own timesheets. Timesheets are automatically routed to Supervisors for approval, at the end of each pay period. An employee can still enter edits on their timesheet until it is approved by their Supervisor. Once this first approval is done, the employee may no longer enter any changes on their timesheet.

Supervisor (Time Approver) Approvals

Timesheets route from employees to Supervisors at the end of the pay period (midnight on the second Saturday of that two-week period). Supervisors must approve timesheets for the employees in the Work Areas they supervise. When Supervisors approve timesheets, they verify that the hours worked are correct and recorded under the correct assignment.

Payroll Processor Approvals

Payroll Processors approve timesheets for all the employees in their Department. The Payroll Processor's approval verifies that it is okay to pay employees for the hours worked. Timesheets will be available for Payroll Processor approval as soon as they have received Supervisor approval. If an employee has multiple assignments in multiple Work Areas, or multiple Departments, the Payroll Processor will not receive that timesheet for approval until all the Supervisors have approved it.

Any timesheets not yet approved by Supervisors, will be auto-approved by the system and available to Payroll Processors on Wednesday morning.

Payroll Processor approvals function just as the Supervisor approvals described above, except these approvals are the final approvals required in Kuali Time. Payroll processors have until 3:00 PM Wednesday, following the end of a pay period, to approve timesheets. After 3:00 PM on Wednesday, the interface with HRMS Payroll begins, and on Thursday, employee hours will be available for approval on the payroll vouchers.

Supervisors and Payroll Processors will be notified via Kuali Time email listservs or OneStart announcements if there are any changes to the normal approval schedule.

Warning! The Approve button will not appear in the timesheet 'Action' column for Payroll Processors until they log in using their OTP (One Time Password) token.

Timesheets Not Ready to Approve

Some timesheets may have problems that prevent them from being approved. In this case, the Supervisor or Payroll Processor should enter needed corrections to the timesheet before approving it. For some departments this is the only approval, and it verifies that it is okay to pay employees for the hours worked, and the timesheet becomes Final.

The Time Detail tab will display error and warning messages at the top of the timesheet in red text. Most entries, such as using sick or vacation time in excess of available balances, will issue a warning.

If there are only warnings, the timesheet will advance for approval, but the warning stays on the timesheet so the Supervisor and Payroll Processor will see it during approvals.

Timesheets with problems will not have an active approval button in the Action column (the button will be grayed out or the column will be blank). These timesheets must be individually opened and corrected before approval can occur.

Supervisors or Payroll Processors will be unable to approve timesheets with the following problems:

Overlapping Time Blocks: Time Blocks which include the same hours.

Hours charged to an invalid assignment: This means hours were charged to an assignment that was later deleted or end-dated on a prior date. A warning message will be displayed when viewing a timesheet with invalid Time Blocks. To correct this problem simply open the timesheet, and make any needed corrections to the employee's hours or assignment.

Expected hours are not met: Appointed staff employees have a number of expected hours that must be accounted for each week. For example, a full-time Biweekly employee must account for 40 hours, while a half-time Biweekly employee needs to account for 20 hours each week.

ABS hours exceed standard hours: For a Biweekly employee, hours charged to ABS (Absent without benefits) must not exceed Standard Hours (40 hours each week for a full-time Biweekly employee).

Corrective action should be taken to fix any errors or warnings that violate University or departmental policies

Approving Timesheets

Detailed steps are presented below for performing individual and bulk timesheet approvals. Please note these procedures list all the possible steps, including ones where you may need to change automatic lunch deductions or enter a correction on a timesheet. If you have already performed that step or find it unnecessary, please go to the next step in the procedure.

To approve an individual timesheet, follow these steps:

1. Log in to Kuali Time and go to the Approvals tab or Payroll Processer tab.
2. Select the Department you wish to approve from the Department dropdown. That displays a list of timesheets you can approve.
    - You can use the Work Area field to sort and view your timesheets by a specific work area.
    - You can use the Approval Status field to view which timesheets are approvable (or to view the ones that have a problem and are un-approvable).
    - You can use the Search By field to search for a specific timesheet by Document ID, Principal ID (University ID), Principal Name (Username), or Last Name. Select the parameter you wish to search by and in the Value field, enter the specific value you want to find, and then click Search. (Note: You must enter at least 5 characters into the Value field to start a search.)
3. Review the Summary of hours for that timesheet. You can click on the plus button next to the employee's name to open a view of the timesheet summary section and view the hours recorded under each Assignment. [Click the minus button to close the Summary section.]

HOL: Holiday																
Customer Service : $17.00 Rcd 0 UA-FMOP					8.00	8.00		16.00								16.00
RGN: Regular Pay Nonexempt Staff																
Customer Service : $17.00 Rcd 0 UA-FMOP		8.20	8.20	7.60				24.00		8.00	8.00	8.00	8.00	8.00	40.00	64.00
Regular Pay Totals		8.20	8.20	7.60	8.00	8.00		40.00		8.00	8.00	8.00	8.00	8.00	40.00	80.00
CPE: NO PAY-Comp Hours Earned																
Customer Service : $17.00 Rcd 0 UA-FMOP				0.90				0.90								0.90
Overtime Totals				0.90				0.90								0.90

4. If necessary, enter any changes to the Time Blocks for regular hours, leave hours or dollar amounts on the timesheet. You can also delete automatic meal deductions if an employee worked without taking a meal.
    a. Click on the Document Id to open that timesheet on the employee's Time Detail tab. In the Pay Period calendar, you can add, edit or delete regular Time Blocks, leave hours, or amounts.
        i. To add a new Time Block, or a block of leave hours or dollar amounts, click on a day, complete the fields on the 'Add Time Blocks' entry box and click Add. If the Time Block goes across multiple days, make sure the 'Apply time to each day' box is CHECKED.
        ii. To edit any Time Block on that timesheet, click on the underlined Assignment name within that block to open the 'Add Time Block' entry box. You can modify the Date Range, and/or the Earn Code. The fields in the entry box change based upon the Earn Code selected, so you may need to modify the In/Out times, the Hours, or the Amount to complete your correction. When finished with your edits, click Update.

iii. To delete any Time Block from the timesheet, click on the red 'X' button in the upper right corner of the block. A confirmation message opens, asking you to click OK to confirm the delete, (or click Cancel to cancel it.)

iv. (Optional step) To delete an automatic meal deduction, and credit the meal hour(s) as regular work hours, find the meal deduction Time Block that needs to be removed. In the yellow bar showing the number of minutes deducted for the meal/ or lunch, click on the red 'X' button.

b. When finished with this timesheet, click Return in the header to return to your Action List on the Approvals or Payroll Processor tab.

5. To approve an individual timesheet, you can use any of three methods:

   - If the timesheet is still open on the pay period calendar (you didn't return to your Action List), click the Approve button located just below the calendar.
   - On your Action List, click the "Select" checkbox for that timesheet and then click the Approve button (located next to the checkbox)
   - Click the Approve button at the bottom of the Action List page, to approve that one timesheet.

   This completes the approval, grays-out the Approve button for that timesheet, (and if is the final approval, updates the 'Status' field of the timesheet to show "Final.")

6. To update the 'Document Status' for that timesheet on your Action List, you can click the Refresh Status button.

To approve more than one timesheet or to do bulk approvals:

1. Log in to Kuali Time and go to the Approvals or Payroll Processor tab.
2. Select the department you wish to approve from the Department dropdown. That displays a list of timesheets you can approve.
   - You can use the Work Area field to sort and view your timesheets by a specific work area.
   - You can use the Approval Status field to view which timesheets are approvable (or to view the ones that are un-approvable).
3. Review the timesheet summary of hours information for each employee. You can click on the plus button by the employee's name to pop open a 'summary view' which shows you the hours that employee recorded, by Assignment. [Click the minus button to close up the summary.]
4. If necessary, enter any changes to the Time Blocks, leave hours or amounts on these timesheets, and/or delete any automatic meal deductions if an employee worked without taking a meal.
   a. Click on the Document Id, which opens that timesheet on the employee's Time Detail tab. In the Pay Period calendar, you can add, edit or delete regular Time Blocks, leave hours or amounts.
      i. To add a new Time Block, or a block of leave hours or dollar amounts, click on a day, complete the fields on the 'Add Time Blocks' entry box and click Add. If the Time Block goes across multiple days, make sure the 'Apply time to each day' box is CHECKED.
      ii. To edit any Time Block on that timesheet, click on the underlined Assignment name within that block to open the 'Add Time Block' entry box. You can modify the Date Range, and/or the Earn Code. The fields in the entry box change based upon the Earn

Code selected, so you may need to modify the In/Out times, the Hours, or the Amount to complete your correction. When finished with your edits, click Update.

iii. To delete any Time Block from the timesheet, click on the red 'X' button in the upper right corner of the block. A confirmation message opens, asking you to click OK to confirm the delete, (or click Cancel to cancel it.)

iv. To delete an automatic meal deduction, and credit the meal hour(s) as regular work hours, find the Time Block(s) with the meal deduction that needs to be removed. In the yellow bar showing the meal deduction, click on the red 'X' button.

b. When finished with the timesheet, click Return in the header to return to your Action List on the Approvals or Payroll Processor tab.

c. Repeat this step (step 4) for each timesheet you need to adjust.

5. To mark a timesheet in your list as ready to approve:

   a. Click the "Select" checkbox for that timesheet. You can select multiple timesheets in your Action List as ready to approve, but you must select each one individually.

   b. To mark ALL timesheets in your list for bulk approval, use the select "all" checkbox at the top of the 'Select' column.

6. To take the bulk approval action for the selected timesheets, click the "Approve" button at the bottom of your Action List page.

This completes the approval, grays-out the Approve button for those timesheets, (and if this is the final approval, updates the 'Document Status' for each to show as "Final.")

7. To update the 'Document Status' for those timesheets on your Action List, you can click the Refresh Status button.

When finished approving your timesheets you can logout.

Automated Approvals

If a Supervisor fails to approve a timesheet, the Kuali Time system will do an auto-approval for that Supervisor (at midnight on the Tuesday following the end of the pay period) in order to route that timesheet on to the Payroll Processor. The Supervisor will receive an FYI notification that the system did this approval. Accessing the timesheet via the action list will clear the FYI from the action list.

If a Payroll Processor fails to approve a timesheet, the Kuali Time system will do an auto-approval for that Payroll Processor (at 3:00 PM on the Wednesday following the end of the pay period) in order to final approve that timesheet. The Payroll Processor will receive an FYI notification that the system did this approval. Accessing the timesheet via the action list will clear the FYI from the action list.

Important! The system auto-approvals are NOT to be used in lieu of reviewing and approving timesheets.

The system does these auto-approvals as a fail-save measure to ensure that employees are paid if a problem keeps a Supervisor or Payroll Processor from completing their normal approvals.

Auto-approvals performed each pay period are audited by Payroll and departments may be contacted to explain why that timesheet was not approved.

Time Hours on the Payroll Voucher

The hours transmitted from Kuali Time will be loaded as "protected" on the payroll voucher, so these will always remain unchanged for audit purposes. However, the hours may be adjusted up or down, if needed, by adding or subtracting hours from the appropriate earn code using the “Add Hours” button to generate a blank line.

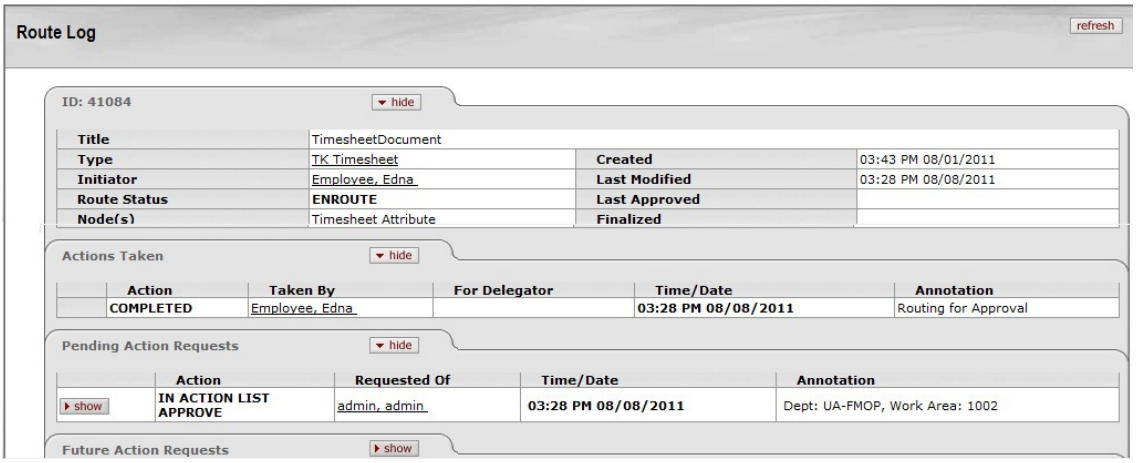
To add hours to a voucher with Kuali Time hours already loaded, click the “Add Hours” button, to add a blank row. Changes made in this way will not retroactively be recorded on the timesheet. They should be documented in the same way that changes to employees timesheets would be; the timesheet from Kuali Time should be printed, the change(s) noted, initialed by the employee, and kept on file for the mandatory retention period.

If every employee on a Payroll Voucher is a Kuali Time employee with hours brought over from Kuali Time for at least one week of the pay period, then the Payroll Voucher will already be approved in HRMS. If the Voucher contains any employees who don’t record their hours in Kuali Time or any Kuali Time employees who recorded no hours for the pay period, then the Payroll Processor must go into the voucher and select “Approve All”.

Warning! Do NOT enter information on the payroll voucher for Kuali Time employees before the Time data has been loaded to the Vouchers. Any data manually entered on the Vouchers will be wiped out by the Time Extract data load and lost.

Checking the Route Log

The Route Log for a timesheet shows who has approved a timesheet and who still needs to approve it.



To check the Route Log for a document, click on the Route Log section at the bottom of the Time Details tab on the employee’s timesheet. The Route Log will open and show who has taken action and whose action, if any, is still pending.

- The Document ID section contains identifying information about the document itself.
- The Actions Taken section shows who has taken action on the timesheet and when. Note that timesheets will appear here as initiated by the employee, though the Kuali Time system initiates them on behalf of the employee. Timesheets are completed by the employee and submitted by the system for approval at the end of the pay period.
- The Pending Action Requests section shows who still needs to take action on the document. It is possible that multiple requests exist at the same time. This situation will occur if the employee has

multiple Time Assignments with different Supervisors.

- The Future Action Requests section shows who will need to take future action on the document.

Time Reports in the IUIE

Reports generated from Kuali Time data are available in the Indiana University Information Environment (IUIE). IUIE is a web-based interface that gives users access to data from several university applications, including Time. Users can customize the environment to meet their data reporting needs.

Prior to using IUIE, users must have an IUIE account. Supervisors/Time Approvers and Payroll Processors should receive an IUIE account when their Kuali Time access is granted.

For more information about the IUIE, or to request an account, visit the IUIE web page via Onestart or: https://www.indiana.edu/~iuie/prod/IuieWelcome.html

For more information about using the IUIE and the reports available there, see the TIME User Documentation page: https://fms.iu.edu/payroll/kuali-time/

More Options for Approvers

This section discusses other options that Kuali Time provides for Supervisors, Payroll Processors, Reviewers and Administrators, which were not discussed in the previous sections of this manual. It also includes a brief review of how to view the timekeeping rules set up for your department.

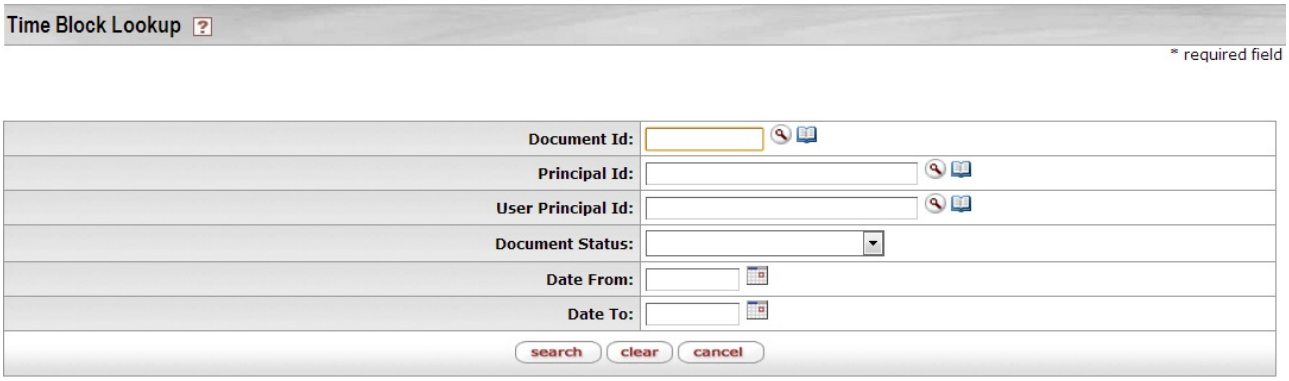
Using Inquiry Pages

On the Admin tab, Kuali Time provides four Inquiry screens that are useful tools to look at the time blocks recorded on a timesheet, to view the history of time blocks added or deleted from a timesheet, to see the clock transactions logged by an employee, and to find any missed clock punch documents submitted by or for an employee.

Time Block Inquiry

Reviewers, Supervisors, Payroll Processors, and Department Administrators with employees in Kuali Time can use the Time Block Inquiry to view the time blocks recorded on a particular timesheet, or for a specific employee.

Important! Time Blocks are never deleted from the system, they are just inactivated.



To perform a Time Block Inquiry, follow these steps:

1. Log into Kuali Time, go to the Admin tab, and in the Inquiries column, click the “Time Block Inquiry” link.
2. Enter the Document Id of the timesheet you want to view the time blocks entered on that particular timesheet.
3. You can also search by other criteria including the Principal Id (University Id of employee), User Principal Id (University Id of person who entered the Time Block), Document Status and Date From and Date To (to find Time Blocks entered on a specific date or range of dates).
4. Click Search.

The results of this search are displayed in a tabular format and include: Document Id, Principal Id, Job Number, User Principal Id, Earn Code, Work Area, Task, Hours or Amount, Overtime Preference, Lunch Deleted, and Begin Time and End Time.

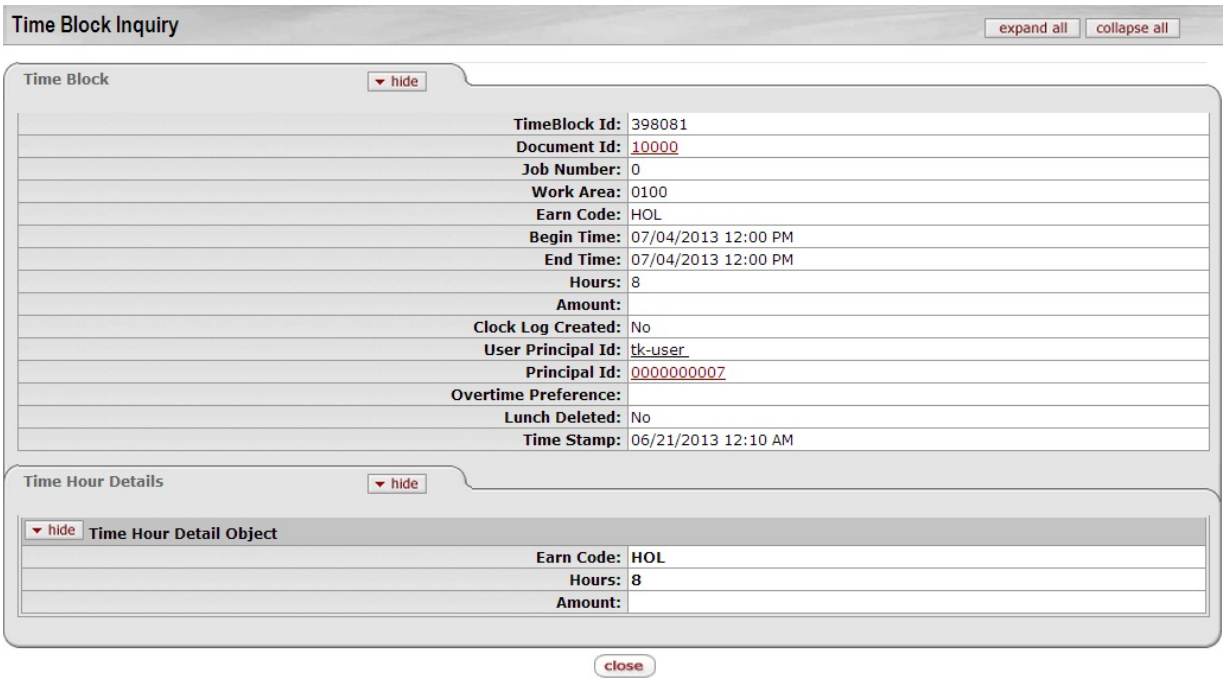
9 items retrieved, displaying all items.

Document Id	Principal Id	Job Number	User Principal Id	Earn Code	Work Area	Task	Hours	Amount	Lunch Deleted	Begin Time	End Time
10000	0000000007	0	0000000007	RBP	0100	0	5		No	07/01/2013 08:30 AM	07/01/2013 01:30 PM
10000	0000000007	0	0000000007	RBP	0100	0	5		No	07/05/2013 08:30 AM	07/05/2013 01:30 PM
10000	0000000007	0	0000000007	RBP	0100	0	4.25		No	07/03/2013 01:30 PM	07/03/2013 05:45 PM
10000	0000000007	0	0000000007	RBP	0100	0	3		No	07/01/2013 02:00 PM	07/01/2013 05:00 PM
10000	0000000007	0	0000000007	HOL	0100	0	8		No	07/04/2013 12:00 PM	07/04/2013 12:00 PM
10000	0000000007	0	0000000007	RBP	0100	0	4.5		No	07/03/2013 08:30 AM	07/03/2013 01:00 PM
10000	0000000007	0	0000000007	RBP	0100	0	3.42		No	07/02/2013 02:00 PM	07/02/2013 05:25 PM

Export options: CSV | Excel | XML

5. (Optional step) You can click on any of the (underlined) Document Id numbers in the results to open a page that shows a full description of that Time Block. The details displayed are the TimeBlock Id, Document Id, Job Number, Work Area, Earn Code, Begin Time, End Time, and the Hours or Amount (if applicable), User Principal Id, Principal Id, Lunch Deleted, Time Stamp, along with a confirmation indicating whether or not the entry was logged by the clock.

   At the bottom, are the Time Hour Details, which show the Earn Code, Hours and/or Amount, (including any minutes deducted for a lunch or meal.) (Click Close to exit this page.)

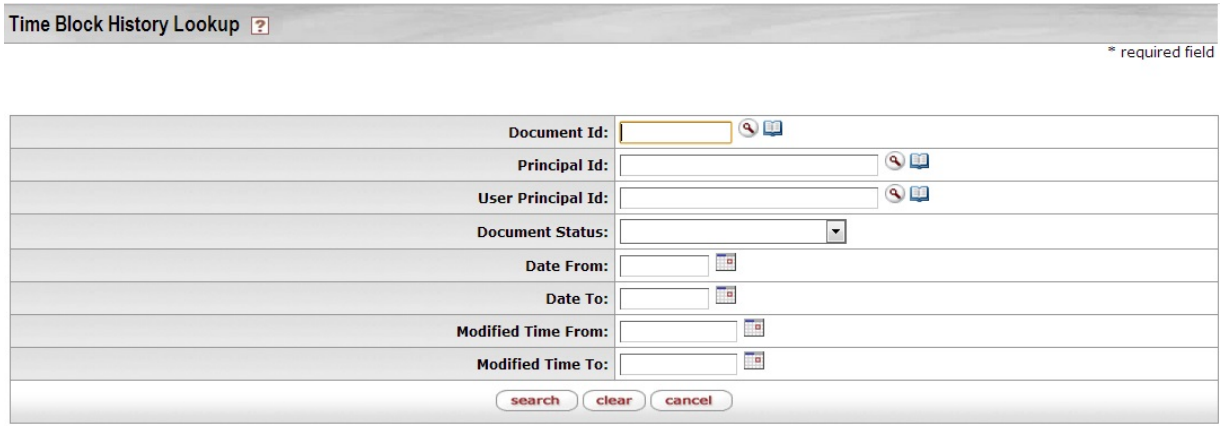


6. Click Cancel to close the search results page and return to the Admin tab.

Time Block History Inquiry

Reviewers, Supervisors, Payroll Processors, and Department Administrators who have employees in Kuali Time can go to the Admin tab and use the Time Block History Inquiry to view the history of time blocks entered on a particular timesheet or for a specific employee. The history that is recorded will show when time blocks were added, updated, or deleted from that employee's timesheet.

Important! Time Blocks are never deleted from the system, they are just inactivated.



To perform a Time Block History Inquiry, follow these steps:

1. Log into Kuali Time, go to the Admin tab, and in the Inquiries column, click the "Time Block History Inquiry" link.
2. Enter the Document Id of the timesheet you want to view the history of any Time Blocks clocked, added, or deleted on that particular timesheet.
   - You can also search by other criteria including the Principal Id (University Id of employee), User

Principal Id (person who added/removed the time block), Document Status, and the Date From and Date To fields.

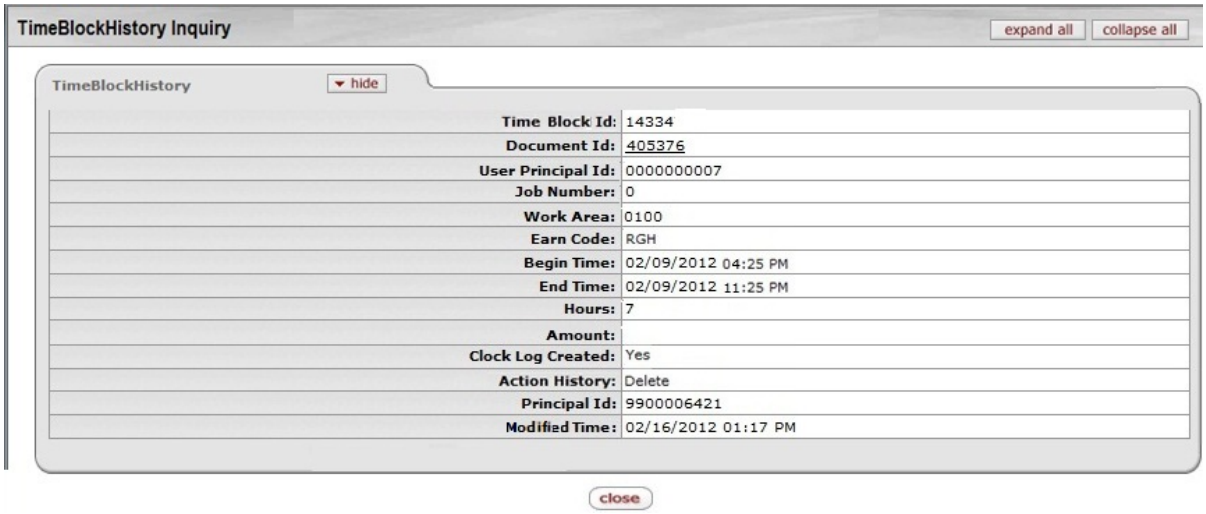
3. Click Search.

The results of this search are displayed in a tabular format and include: Document Id, Principal Id, Time Block Id, Work Area, Task, Job Number, Earn Code, Begin Time and End Time, and Hours or Amount, and User Principal Id, along with a confirmation indicating whether the action was recorded in the clock log, what Action History was performed on that Time Block (add, clock, missed punch, or delete), and time when it was modified.

122 items retrieved, displaying 1 to 100.[First/Prev] 1, 2 [Next/Last] Time

Document Id	Principal Id	Time Block Id	Work Area	Task	Job Number	Earn Code	Begin Time	End Time	Hours	Amount	Clock Log Created	Action History	User Principal Id	Modified Time
3113	10039	975575	10005	0	0	RGN	09/17/2012 04:33 PM	09/17/2012 04:36 PM	0.05	0.00	Yes	Delete	10039	09/17/2012 04:36 PM
3113	10039	975575	10005	0	0	RGN	09/19/2012 03:48 PM	09/20/2012 12:00 AM	7.70	0.00	Yes	Add	10039	09/17/2012 04:36 PM
3113	10039	975575	10005	0	0	SCK	09/18/2012 11:59 PM	09/18/2012 11:59 PM	8.00		No	Add	10039	09/17/2012 04:53 PM

a. (Optional step) You can click on the (underlined) Document Id link in the search results to open a full description of that historical Time Block. The details shown in this Inquiry screen are the Time Block Id, Document Id, Principal Id, Work Area, Job Number, Earn Code, Begin Time, End Time, Hours or Amount, along with the Clock Log Created confirmation, Action History indicator, User Principal Id, and time when it was modified. (Click Close to exit this page.)



5. (Optional step) You can click on the (underlined) Time Block Id link in the search results to open the Time Block Inquiry screen and view the details about that Time Block. (Click Close to exit this page.)
6. (Optional step) You can click on the (underlined) Principal Id or User Principal Id links in the search results to open an Inquiry screen for that person, which shows their Kuali Affiliation Type (student, staff), along with their basic employment information. (Click Close to exit this page.)
7. Click Cancel to close the search results page and return to the Admin tab.

Clock Log Inquiry

Reviewers, Supervisors, Payroll Processors, and Department Administrators who have employees in Kuali Time can use the Clock Log to view the clock transactions logged on a particular timesheet.

To perform a Clock Log Inquiry, follow these steps:

1. Log into Kuali Time, go to the Admin tab, and in the Inquiries column, click the “Clock Log” link.
2. Enter the Document Id of the timesheet or Principal Id of the employee you wish to view. (You can also search by Work Area, Task, IP Address or Clock Timestamp From and Clock Timestamp To.)
3. Click Search.

The results of this search are displayed in a tabular format and include: Document Id, Principal Id, Work Area, Task, IP Address, Clock Action, Job Number, User Principal Id, Clock Timestamp, Clock Timestamp Timezone, Timestamp, and Missed Punch Document Id.

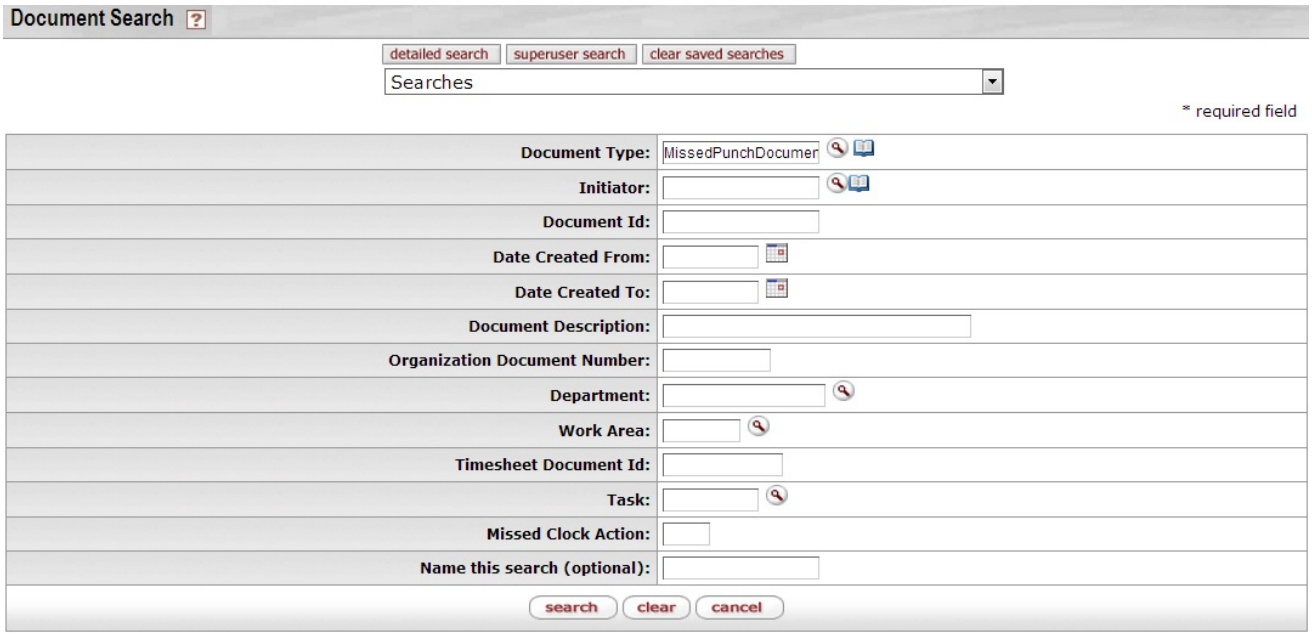
4 items retrieved, displaying 1 to 4

Document Id	Principal Id	Work Area	Task	IP Address	GPS Longitude	GPS Latitude	Clock Action	Job Number	UserPrincipal Id	Clock Timestamp (MM/DD/YYYY HH:MM AM	Clock Timestamp Timezone	Timestamp	Missed Punch Document Id
10000	1000000009	7891	0	129.79.25.18			CI	0	1000000009	09/07/2010 12:00 AM	America/Indianapolis	09/17/2010 12:34 AM	0109700
10000	0000000081	7891	0	10.56.9.153			CO	0	0000000081	09/07/2010 01:00 AM	America/Indianapolis	09/17/2010 01:00 AM	
10000	0000000081	7891	0	10.56.9.153			CI	0	0000000081	09/20/2010 03:00 PM	America/Indianapolis	09/20/2010 03:01 PM	
10000	0000000081	7891	0	10.56.9.153			CO	0	0000000081	09/21/2010 12:00 AM	America/Indianapolis	09/20/2010 11:57 PM	

4. (Optional step) If you click on an employee’s (underlined) Principal Id, Work Area, or Task links, it opens an Inquiry page which shows details about that person, work area or task. (Click Close to exit page.)
5. Click Cancel to close the search results page and return to Admin tab.

Missed Punch Inquiry

Reviewers, Supervisors, Payroll Processors, and Department Administrators with Clock-Entry employees can use the Missed Punch inquiry to find Missed Punch documents that were submitted by or for employees to report missed clock punches.



To perform a Missed Punch Inquiry, follow these steps:

1. Log into Kuali Time, go to the Admin tab, and in the Inquiries column, click the “Missed Punch” link.
2. This opens the Document Search screen (with the Document Type pre-loaded as ‘MissedPunchDocument.’)
   - Enter the Document Id of the Missed Punch document that was submitted by either you or the employee.
   - If you don’t have the Document Id then you can search for any Missed Punch documents by Initiator (Username of the person who submitted the document, usually the employee), by Department, or by a date range in the Date Created From and Date Created To fields.

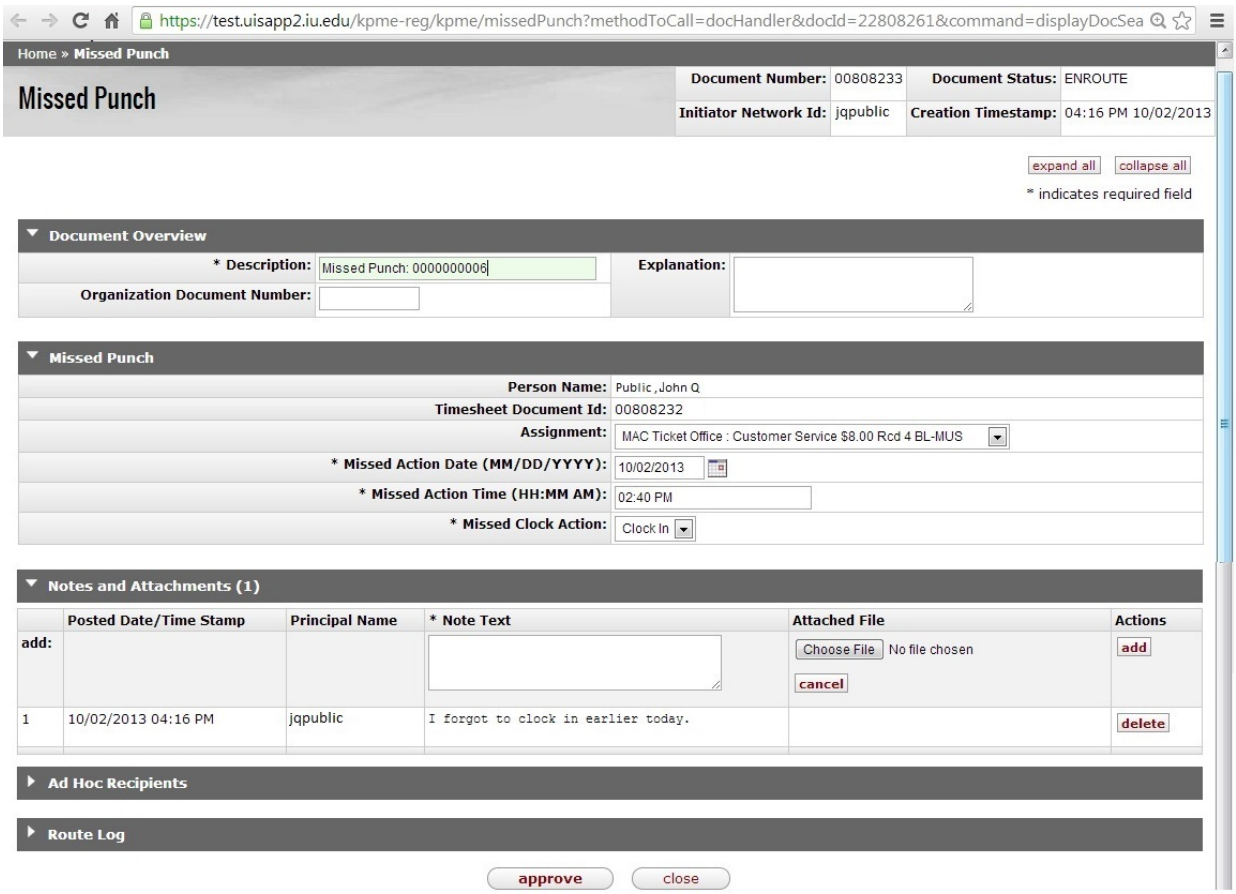
   HINT: Use the lookup button next to the Initiator field to search for a specific employee.

3. Click Search. This will find any Missed Punch Document that matches your search criteria.

The information displayed in the search results includes the Document Id, Document Type, Title, Status, Initiator, Date Created, Department, and Route Log.

4. Click on the underlined Document Id number to open a copy of the Missed Punch Document that was submitted for an Assignment so you can view the clock action, and date and time of the clock punch that was missed.

   a. If you are the employee’s Supervisor and the Missed Punch document is awaiting your approval, you have the option to edit it (before approving) to enter any corrections to the employee’s Clock Action, Action Date and/or Action Time.
   b. If the date and time of the missed punch is correct, then click Approve to approve the document.



5. Click Close to close the Missed Punch Document and return to your search results.
6. Click Cancel to close the search results page and return to the Admin tab.

Viewing Timekeeping Rules

If you are a Supervisor or Payroll Processor, you can view the business rules for your department.

On the Admin tab, under the 'Time Keeping' section, all Rule maintenance screens will take you to a rule lookup screen. You can enter search criteria or simply click "Search" to view existing rules. It's recommended that you enter the Department ID, Work Area or Location in the search criteria if you wish to see all the rules for your particular department, or campus.

Using the 'Show History' and 'Active' radio buttons on rule lookup screen

When a rule row is edited, the system adds an inactive row for that rule with the same effective date as the new row being edited/added. This will inactivate the old values and the new values will be in place as of the effective date. A key is established which then allows the search to know which rows are prior edited rows vs. new rows.

Show History: The purpose of this radio button (on a rule or maintenance lookup screen) is to allow you to see the highest effective dated row only for a record, or the entire history of a record.

If Show History = No: The results will be the highest effective dated row as of the system date and any future rows.

If Show History = Yes: The results will be all rows in the database for the values entered.

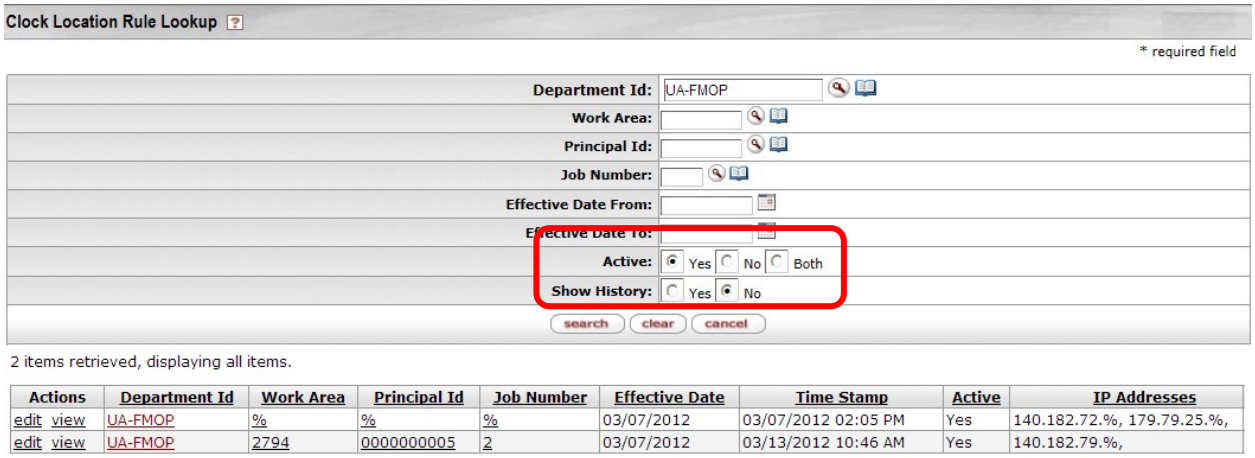
Active: The purpose of this radio button is to allow you to filter rows based on their active status.

**To find the row which is in effect as of today, search for “active = Both, show history = No.”

Rule Look-up Example

In the example below (for Clock Location Rule), we entered a Department ID (UA-FMOP) and clicked Search.

(By default, the ‘Show History’ button is set to “No” and the ‘Active’ button is set to “Yes,” to find the highest effective dated row.) This search found the active rules established for our sample department.



Actions	Department Id	Work Area	Principal Id	Job Number	Effective Date	Time Stamp	Active	IP Addresses
edit view	UA-FMOP	%	%	%	03/07/2012	03/07/2012 02:05 PM	Yes	140.182.72.%, 179.79.25.%,
edit view	UA-FMOP	2794	0000000005	2	03/07/2012	03/13/2012 10:46 AM	Yes	140.182.79.%,

In this example, the rule results that were retrieved show the date and time that the (Clock Location) rule was established, when it became effective, and the department, work area and University ID of the employee who is required to clock at the IP Addresses listed in the rule.

In general, the results retrieved, will display values for most of the fields used as search criteria on that specific Administrative or Rule Lookup screen. It always shows the Effective Date (of that rule row), and whether or not it is Active.

You can view the following Time Keeping Rules for your department:

- Clock Location
- Department Lunch Deduction
- Shift Location
- Time Collection (sets employee as Clock-Entry vs. Manual-Entry)

Rules are discussed in more detail in the Administrative Functions section of this manual.

Viewing Work Area Details

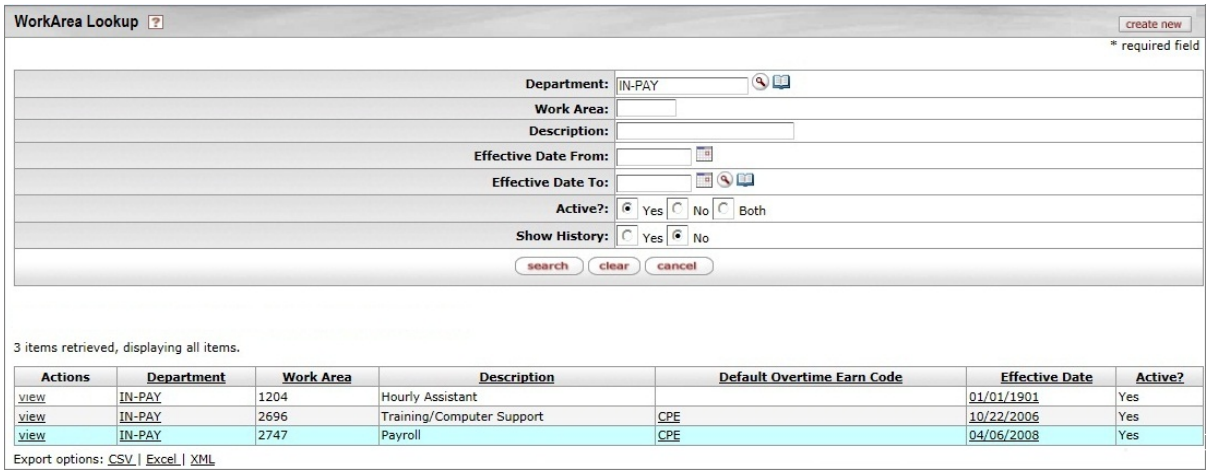
You can use the Work Area Lookup screen to view information about the work areas in your department. Click on the Work Area Maintenance link under the Administrative section to open that Lookup screen.

1. On the Admin tab, click the Work Area Maintenance link to open the Work Area Lookup screen.
2. Enter your search criteria—you can search by Department, or by Work Area, (Work Area) Description, and Effective Date From or Effective Date To.

HINT: Use the “%” symbol in any field (except date fields) as a wildcard value to indicate “ALL.”

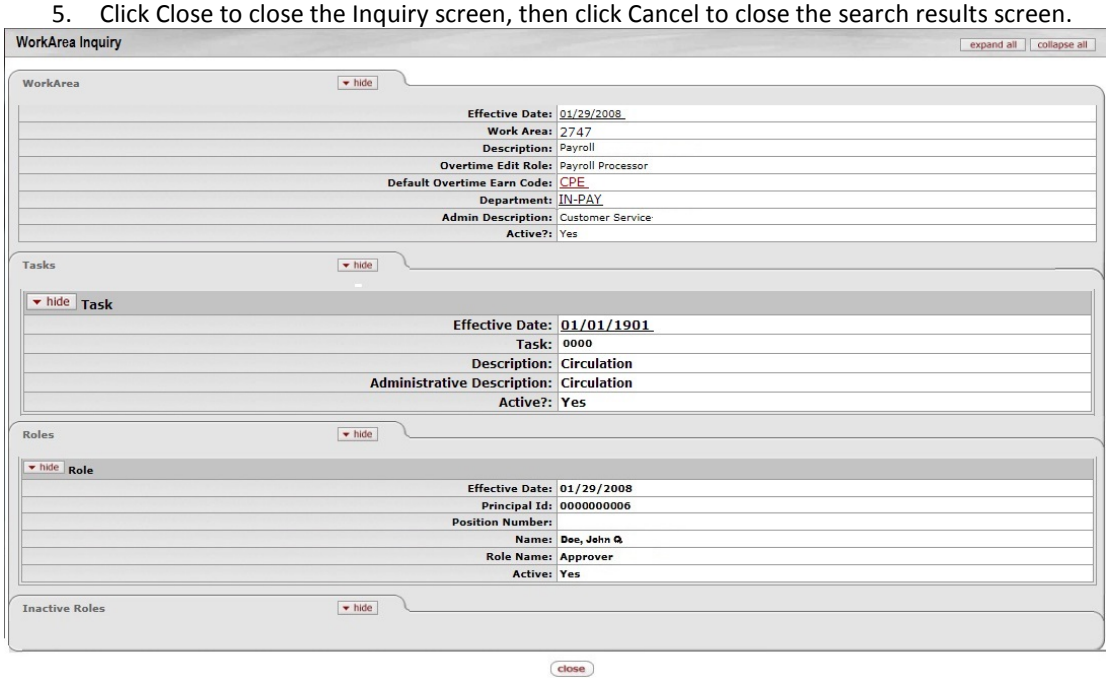
3. Click Search to find Work Area results.

The results of a search on this lookup screen will show you the Department, the Work Area, the (Work Area) Description, the Effective Date, the Default Overtime Earn Code, and whether it is an ‘Active’ work area.


WorkArea Lookup
create new
* required field
Department: IN-PAY
Work Area:
Description:
Effective Date From:
Effective Date To:
Active?: Yes No Both
Show History: Yes No
search clear cancel
3 items retrieved, displaying all items.
Actions | Department | Work Area | Description | Default Overtime Earn Code | Effective Date | Active?
view | IN-PAY | 1204 | Hourly Assistant | | 01/01/1901 | Yes
view | IN-PAY | 2696 | Training/Computer Support | CPE | 10/22/2006 | Yes
view | IN-PAY | 2747 | Payroll | CPE | 04/06/2008 | Yes
Export options: CSV | Excel | XML

4. Click on the view link in any search result row to open the Work Area Inquiry screen and view work area details, such as a list of Tasks under that Work Area, or a list of Approvers, Approver Delegates and Reviewers who can edit or approve that timesheets for that Work Area.

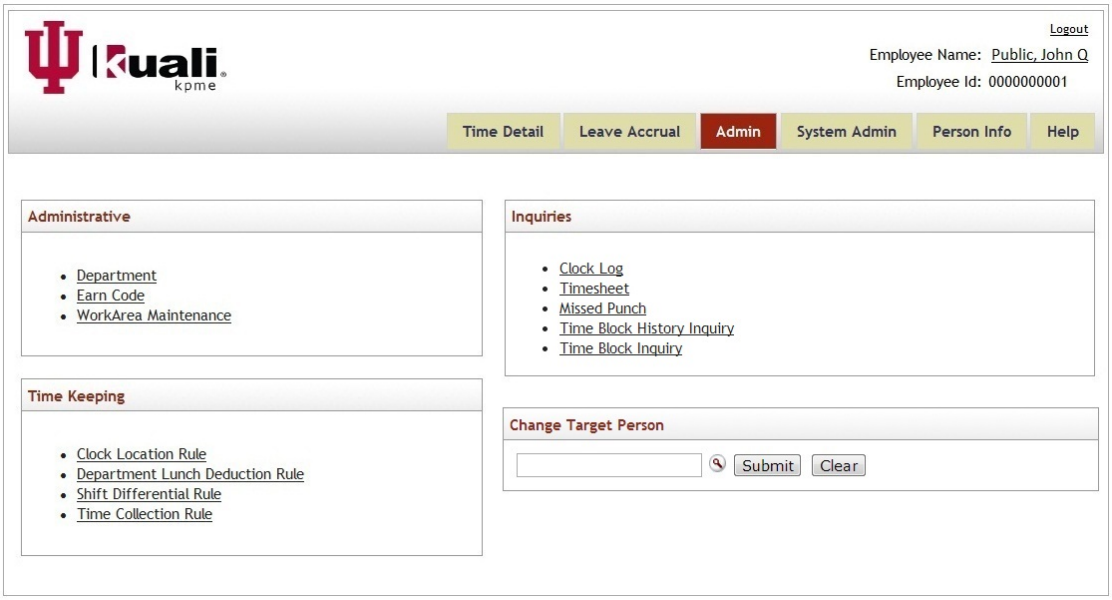
5. Click Close to close the Inquiry screen, then click Cancel to close the search results screen.



Department Administrator Options

As a Department Administrator, when you open the Admin tab you will see links to the Maintenance pages for Time Keeping rules, Administrative functions, and Inquiries (see illustration below).

You will use these pages to create and maintain your Clock Location and Department Lunch Deduction rules, to view the Shift Differential and Time Collection rules impacting your department and work areas, to create and maintain Work Areas for your Department, and to search for specific employee time blocks, historical time blocks, clock transactions, or missed punch documents.



Timekeeping Rules

Department Administrators can establish and maintain business rules that determine how their department will interact with Kuali Time and what available options their employees will use. These business rules allow you, as a Department Administrator, to customize the system to work in the most productive fashion for your department.

Establishing business rules for your Work Areas is an important part of configuring Kuali Time for use by your department. If used correctly, business rules can help make everyone's job easier and make Kuali Time reflect your departmental policies and procedures.

Each departmental business rule is briefly described below:

Clock Location Rule: Allows you to specify if employees should be clocking in and out from a particular computer, identified by that computer's IP address.

Department Lunch Deduction Rule: Determines if your Clock-Entry employees will use an automatic meal deduction, once they work a certain number of hours in a shift. It allows you to set a maximum number of minutes for an employee's meal and that value, usually 30 minutes or 60 minutes, is deducted from the employee's clocked hours.

Shift Differential Rule: (View-only for Department Administrators.) Determines how and when shift pay is earned (based on University policies), which tells the timesheet which shift pay earn codes to use.

Time Collection Rule: (View-only for Department Administrators.) Determines whether your employees will record work hours by clocking in and out (Clock-Entry) or by adding hours manually to their timesheet (Manual-Entry). These rules must follow University, Campus and/or Departmental policies, and will be set up by the System Administrators. You can request an exception to these policies, based on unusual circumstances for an employee.

How Rules Work

Most rules, such as the Departmental Lunch Deduction rule, or the Clock Location rule will not prevent your employees from using Kuali Time in any way. They are intended to establish limits, which will generate exceptions when those limits are exceeded.

For instance, let's say you set a Clock Location rule requiring the employees under Work Area 1002 to clock in on a specific workstation with an IP Address of 129.29.29.10. Kuali Time will not in any way stop an employee from clocking in or out at a different workstation, but the timesheet will display a Warning message (that stays on the timesheet) indicating the employee clocked elsewhere.

The Time Collection rule differs from the other rules in that it impacts what options will be available for employees to record their work hours. It determines whether a time Assignment for a Work Area will be Clock-Entry or Manual-Entry.

Rule Hierarchy

Kuali Time is flexible in that it allows you to apply different rules to different groups of employees. For instance, you might want most of your employees to clock in and out for lunch but perhaps there's a group of employees for which this choice is impractical. You'd like to establish a general rule for all employees to clock in and out for lunch yet make an exception for this particular group. To support this flexibility, rules exist in a hierarchy—where rules that are more specific override rules that are more general. Understanding how this hierarchy functions makes it easier and more efficient for you to establish rules for your department.

Most rules use the same basic criteria to identify whom a particular rule applies to. We can think of this information as being "identification criteria," information that exists to tell Kuali Time who to apply the rule to. Each rule also contains criteria that identify the rule itself—indicating employees must clock in and out for lunch for example. We can think of this as "rule criteria," information that tells Kuali Time what kind of rule limits to apply to the identified group.

The identification criteria used, listed from most general to most specific, are:

Department: The Department ID, such as BL-PARK or IN-SPEA

Work Area: The ID number for a particular Work Area, and used to identify a group of employees within a department.

Principal ID: The ID number that uniquely identifies a specific employee.

Job Number: The identifying number for an employee's job. Employees with multiple jobs will have multiple Job Numbers. You can only specify a Job Number if you have also specified an employee's Principal ID.

Rules established using more specific criteria override those using less specific criteria. Below is an example of different versions of the same rule using different identification criteria. The "%" symbol is a 'wildcard' symbol

that is used in rules to indicate a selection of “ALL.” We’ve numbered the rules so they can be identified and discussed below. The rule criteria itself is unimportant to understanding the hierarchy, so the criteria has been abstracted to simple values of “X,” “Y,” or “Z.”

Example #	Department ID	Work Area	Principal ID	Job Number	Rule Criteria
1	BA-BKST	%	%	%	X
2	BA-BKST	0001	%	%	Y
3	BA-BKST	0001	0001234567	%	Z

Rule 1 indicates that all employees in the Department BA-BKST follow rule “X.” The “%” symbols in all the other identification criteria fields indicate that all Work Areas, employee IDs and associated employee records apply this version of the rule. If you want to establish one version of a rule for the entire department this is a simple way to do that.

Rule 2 indicates that members of Work Area 0001 apply rule criteria “Y.” This means that all employees and all employee record numbers associated with Work Area 0001 are an exception to the general rule established in example 1. Employees in this Work Area will have rule “Y” applied instead.

Rule 3 takes it one step further and says that a specific employee, identified by the employee ID number 0001234567, needs a different version of this rule applied. All this employee’s jobs associated with BA-BKST Work Area 0001 will apply rule “Z.”

It’s unlikely that many users will need the level of flexibility provided by employee Principal ID and employee Job Number. Most users will find being able to apply rules to the Department and Work Area level are sufficient for their needs. However, the flexibility exists to make rules specific to individuals and individual jobs if necessary.

Effective Dates

All Rules are effective dated, allowing them to be changed on specified dates while maintaining a historical record of previous rules.

The Effective Date is the date that a rule takes effect. Rules don’t have an “end date” but instead end the day before a new rule takes effect.

For example, you could have two rules established as shown below.

Effective Date	Department ID	Work Area	Principal ID	Job Number	Rule
01/01/2013	UA-FMOP	%	%	%	A
09/01/2013	UA-FMOP	%	%	%	B

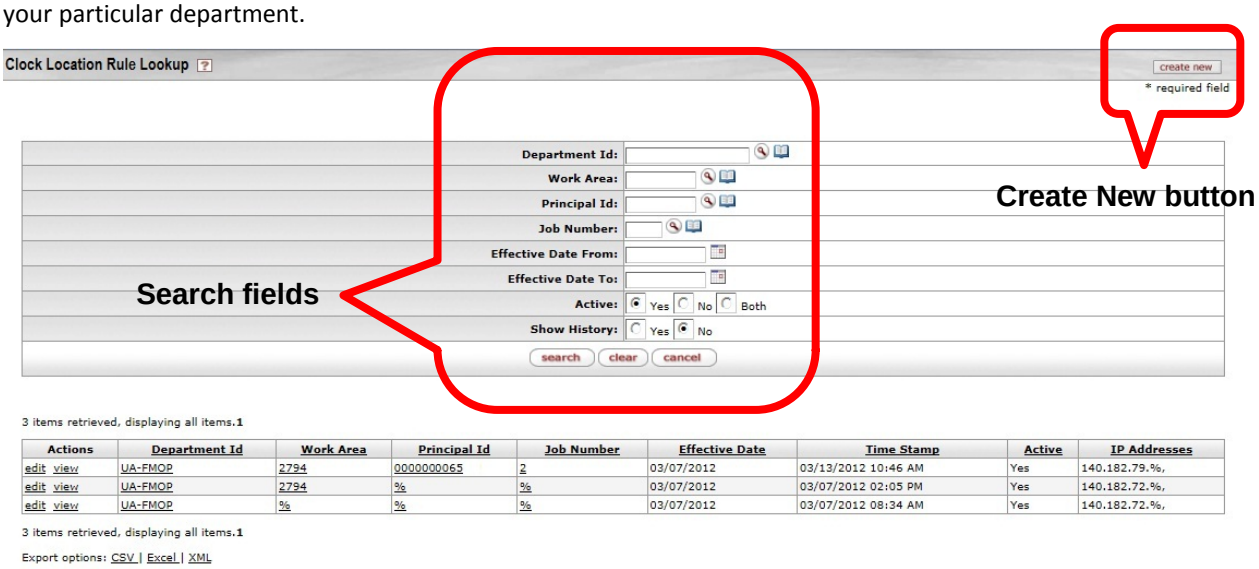
In this case, rule A would be in effect starting on January 1st, 2013 and would stay in effect through August 31st, 2013. Beginning on September 1st, 2013 rule B would take effect.

Searching for Rules

On the Admin tab, under the ‘Time Keeping’ section, all Departmental Rule maintenance screens will take you to a Rule Lookup screen. On the Admin tab, go to the ‘Time Keeping or Administrative’ sections and click on the underlined link to open the Lookup screen for that rule.

Then, enter your search criteria, such as Department ID, Work Area, Principal ID, Job Number, etc., or simply click "Search" to retrieve a list of existing rules.

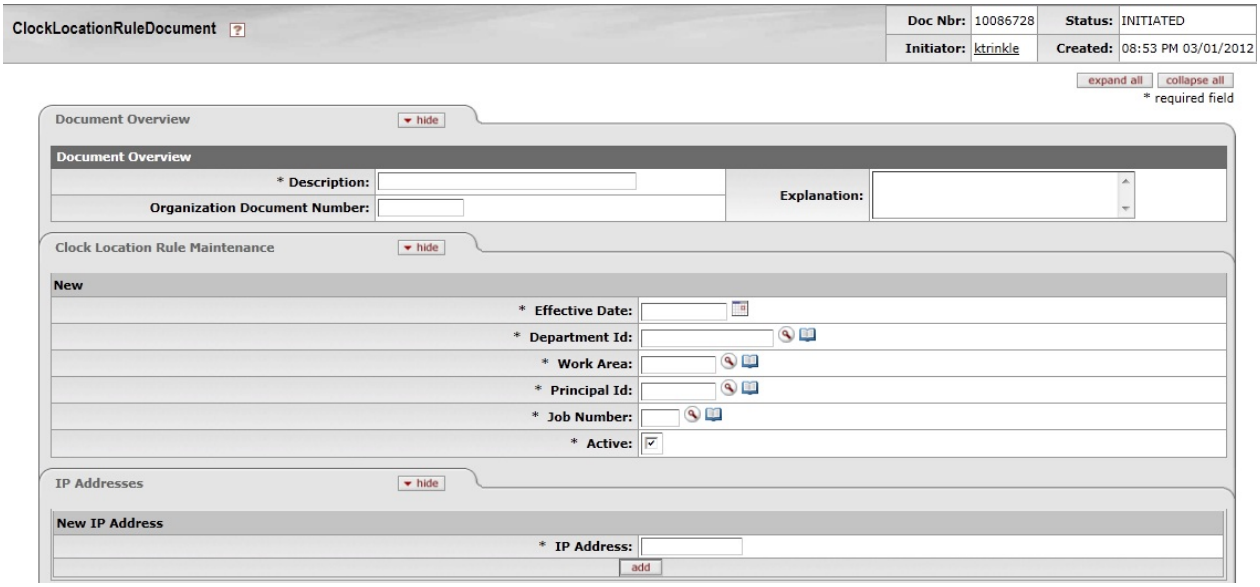
It's recommended that you enter only your Department ID in the search criteria if you wish to see all the rules for your particular department.


Clock Location Rule Lookup
create new
* required field
Department Id:
Work Area:
Principal Id:
Job Number:
Effective Date From:
Effective Date To:
Active: Yes No Both
Show History: Yes No
search clear cancel
Search fields
Create New button
3 items retrieved, displaying all items.1
Actions | Department Id | Work Area | Principal Id | Job Number | Effective Date | Time Stamp | Active | IP Addresses
edit view | UA-FMOP | 2794 | 0000000065 | 2 | 03/07/2012 | 03/13/2012 10:46 AM | Yes | 140.182.79.%,
edit view | UA-FMOP | 2794 | % | % | 03/07/2012 | 03/07/2012 02:05 PM | Yes | 140.182.72.%,
edit view | UA-FMOP | % | % | % | 03/07/2012 | 03/07/2012 08:34 AM | Yes | 140.182.72.%,
3 items retrieved, displaying all items.1
Export options: CSV | Excel | XML

Creating a New Rule

On the Admin tab, go to the 'Time Keeping' section and click on the underlined link to open the Lookup screen for that rule. Then, click the Create New button at the top right of the page (see previous illustration).

This initiates a new Workflow document form where you enter values in the required fields to create the new rule (see document example below).



You must enter or select values in all required fields. (Required fields are marked by an asterisk.)

Enter a Description at the top of each rule document, enter the Effective Date (which will be the date when the new rule takes effect), and enter your Department ID. Next, enter values for the Work Area, Principal ID, and Job Number, and then verify the 'Active' checkbox is checked.

Using Wildcards

You can enter the % (percent sign) as a 'wildcard' value in the Work Area, Principal ID and Job Number fields. When you enter the percent sign, % in a required field, it indicates you want this rule to affect ALL Work Areas, ALL Principal ID's or ALL Jobs.

Note: For the Clock Location Rule document (shown in the illustration above) you are also required to add one or more IP Addresses to specify Clock Locations. In the IP Address field, enter a valid IP address, (for example 200.200.95.10 or 200.200.95.%) and then click Add. Repeat this step for each IP Address you need to add.

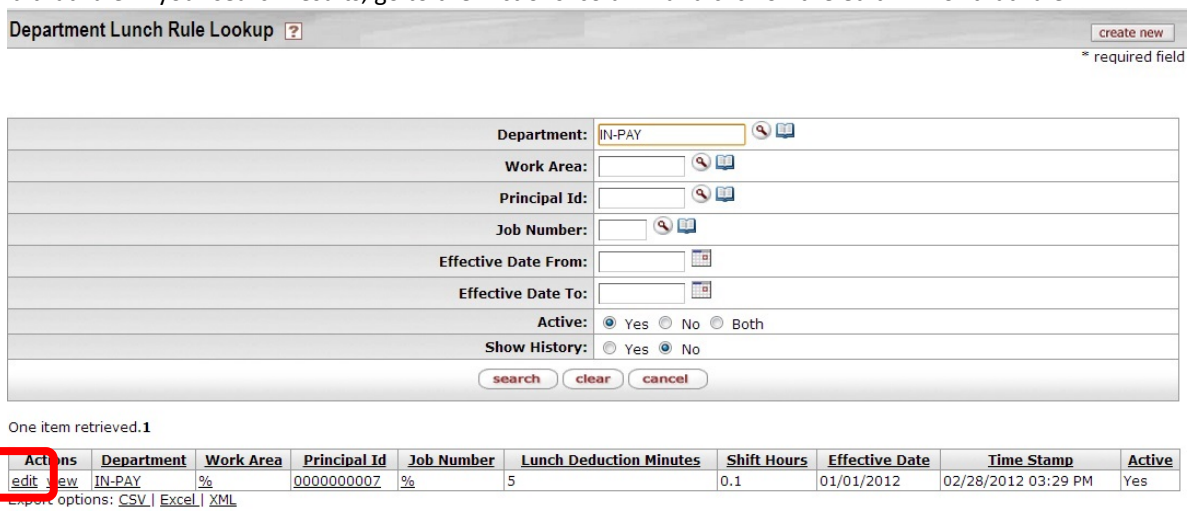
Note: For the Department Lunch Deduction Rule document, you are also required to add the number of Lunch Deduction Minutes to be deducted (usually 30 or 60), and the minimum number of Shift Hours an employee must work before the meal break is deducted (usually 6).

When finished entering your values in the document, click the Submit button, and then click Close to close out of the rule document.

Editing a Rule

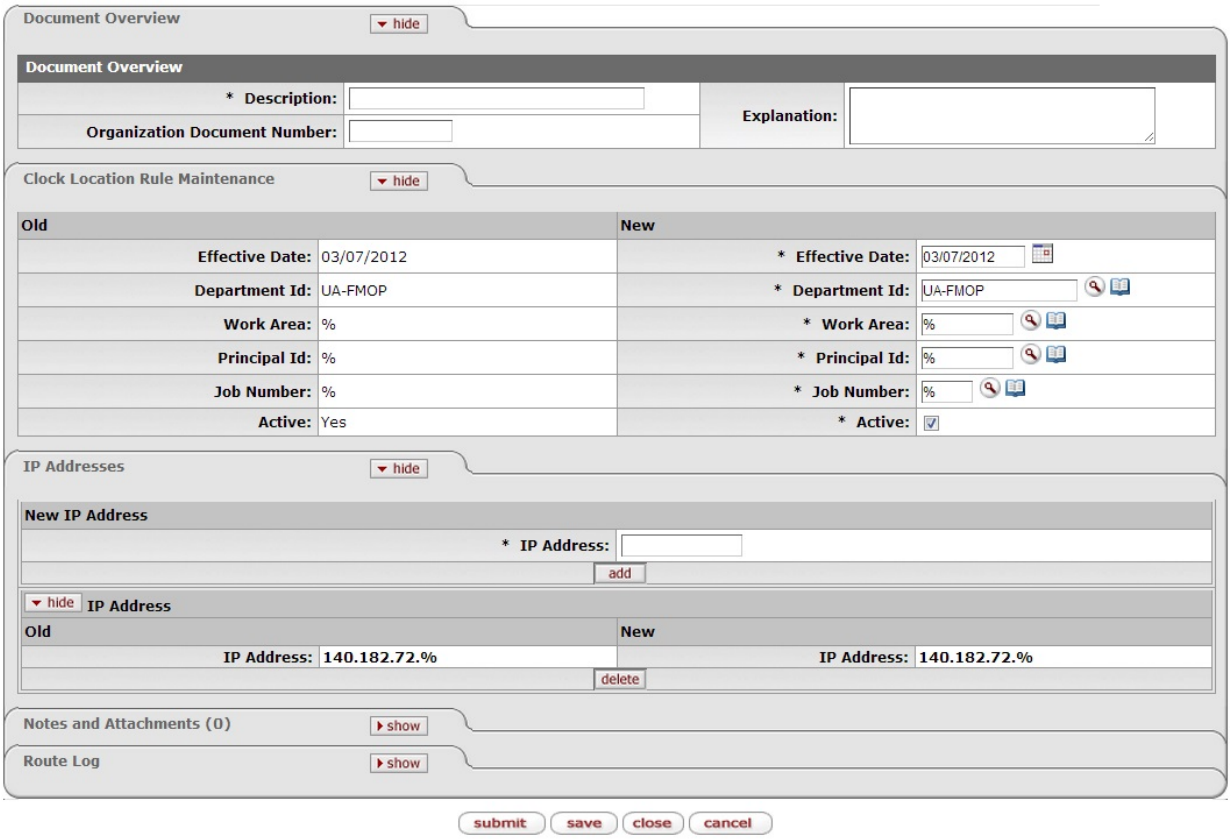
To edit an existing rule, go to the Admin tab and then the 'Time Keeping' section, and select the rule you want by clicking on the underlined link. That opens the rule Lookup screen.

Enter your search criteria (e.g., Department ID and/or Work Area) to lookup the rule you want to edit. Once you find that rule in your search results, go to the 'Actions' column and click on the edit link for that rule.



This opens a Workflow document form showing the Old values on the left.

The rule form will carry over the existing values into a section called 'New' on the right side of the form and you will edit those fields to change the current values for this rule. (Fields requiring values are marked by an asterisk.)



You must enter a Description at the top of each rule document, enter the Effective Date you want (as that is the date the modified rule takes effect) and then update the values in any fields you need to change.

Make sure all the required fields are completed, and the “Active” box is checked, unless you are inactivating this rule. When finished, click the Submit button, and then click Close to close out of the rule document.

Note: To get rid of a rule you don’t want, add a new rule that supersedes it with a more recent effective date or by entering a new version of the rule with the same effective date as the current one. Each rule also contains an “active” flag. If you just want to undo a rule, establish a new version of it with this active flag unchecked. This new inactive rule will take precedence, effectively removing the former rule.

Inactivating a Rule

To inactivate an existing rule, go to the Admin tab and then the ‘Time Keeping’ section, and select the rule you want by clicking on the link (underlined name of the rule). That opens the rule Lookup screen.

Enter your search criteria (e.g., Department ID and/or Work Area) to lookup the rule you want to inactivate. Once you find that rule in your search results, go to the ‘Actions’ column and click on the edit link for that rule

This opens a Workflow document form showing the Old values on the left.

The rule form will carry over the existing values into a section called ‘New’ on the right side of the form.

You must enter a Description at the top of each rule document and enter an Effective Date (which is the date when the rule will no longer apply). Find the "Active" box in the left pane under 'New' and UNCHECK it.

When finished, click the Submit button, and then click Close to close out of the rule document. This will inactivate the rule on the effective date you entered.

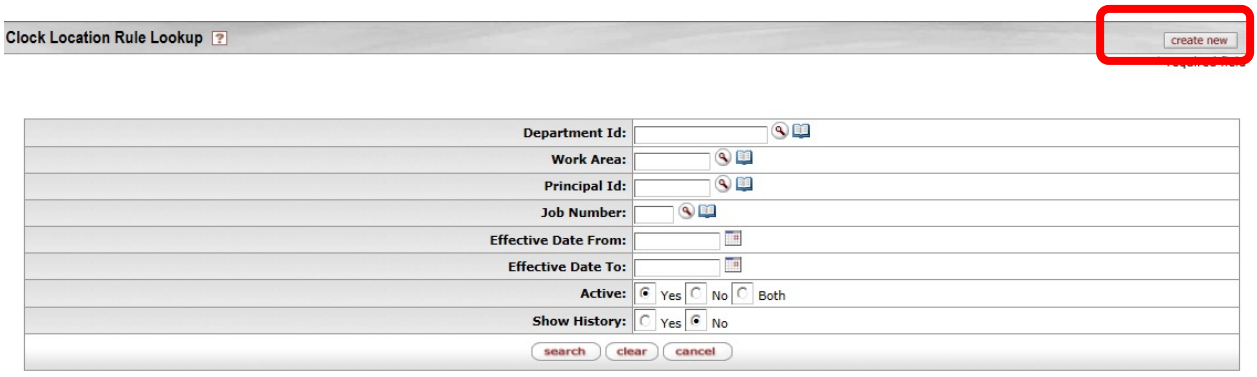
Clock Location Rule

Use this rule to specify that you want a particular group of employees to clock in and out from a specific workstation location.

Clock Location: Please specify the IP Address of the computer where you want your Clock-Entry employees to clock in and out. You can specify more than one IP address as the workstation locations where your employees can clock. If clock actions are entered at other machines, this rule will generate warnings on the timesheet.

Note: This rule does not apply to Manual-Entry employees.

1. Log into Kuali Time, go to the Admin tab, and click on Clock Location Rule link.



2. This opens the Clock Location Rule Lookup:
   - To create a new rule, click Create New (and skip to step 4).
   - To edit (or inactivate) an existing rule, enter your search criteria—Department Id, Work Area, Principal Id and/or employee Job Number. Other lookup parameters include Effective Date From and Effective Date To. Then click Search (and continue to step 3.)

   HINT: Use the "%" symbol as a wildcard value in the Work Area, Principal ID, and Job Number fields to indicate "ALL."

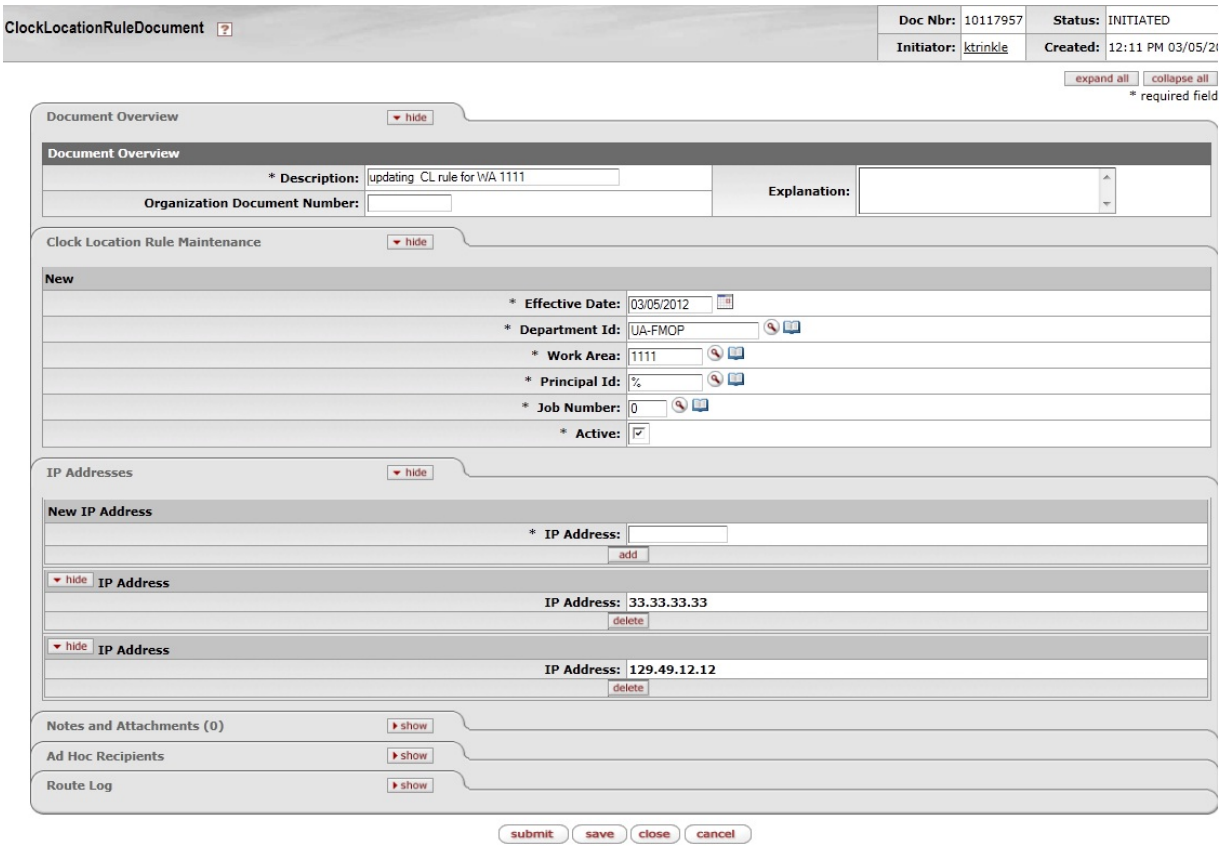
3. In the search results, find the rule that you want to edit (or inactivate) and go to the first column of that rule and click edit.
4. This opens the Clock Location Rule document. Enter a "Document Overview" Description, (no matter whether you are creating, editing or inactivating a rule).
   - If all you want to do is inactivate this rule:
     a. In Effective Date field, enter the date when the rule will no longer apply.
     b. UNCHECK the "Active" box in the right pane under "New."
     c. Then, skip to step 11 and submit the document.

To create a new rule, you must enter values in the required fields marked by an asterisk (*). (Continue to Step 5.)

To edit an existing rule, the document shows the "Old" values for that rule in the left pane and you can edit any of the fields in the right pane. (Continue to Step 5.)

5. Enter a valid Department Id, or verify the existing value is correct.
6. Enter a valid Work Area for that Department, or verify the existing value is correct. (You can enter % as a wildcard value to indicate "ALL" work areas.)
7. Enter a valid Principal Id, or verify the existing value is correct. Note: If you want this rule to affect only one employee in that Work Area, then enter a specific Principal Id. (You can enter % as a wildcard to indicate "ALL" employees for the specified Work Area(s).
8. Enter a valid Job Number, or verify the existing value is correct. Note: If you want this rule to affect only one job record for employee(s), then enter a specific Job Number. (You can enter % as a wildcard to indicate "ALL" job records for the specified employee(s).)
9. You can enter one or more than one IP Address as a clock location:
    a. Verify any IP Address entries already present in the document are correct—this is the IP address of the computer (or kiosk) that you wish this group of employees to clock in and out from.
    b. If required, enter a new IP Address, and click "Add" to add that address to the document.

       Note: You can use the "%" symbol as a wildcard to indicate multiple computers under the same subnet. For example, if employees will be clocking in from multiple computers in the same room, they are on the same subnet, so you could enter 129.72.25.%.
    c. Click "Delete" to remove an existing IP Address that is no longer valid.
    d. Repeat this step (step 9) for each IP Address that you need to add or delete.



10. Leave the "Active" box checked as the default value, unless you want to undo a rule. (In that case, when you establish a new version of a rule, leave the "active" box unchecked.)
11. When finished entering, editing or verifying the rule settings are correct, click Submit.
12. Click Close to close out of document.

Department Lunch Deduction Rule

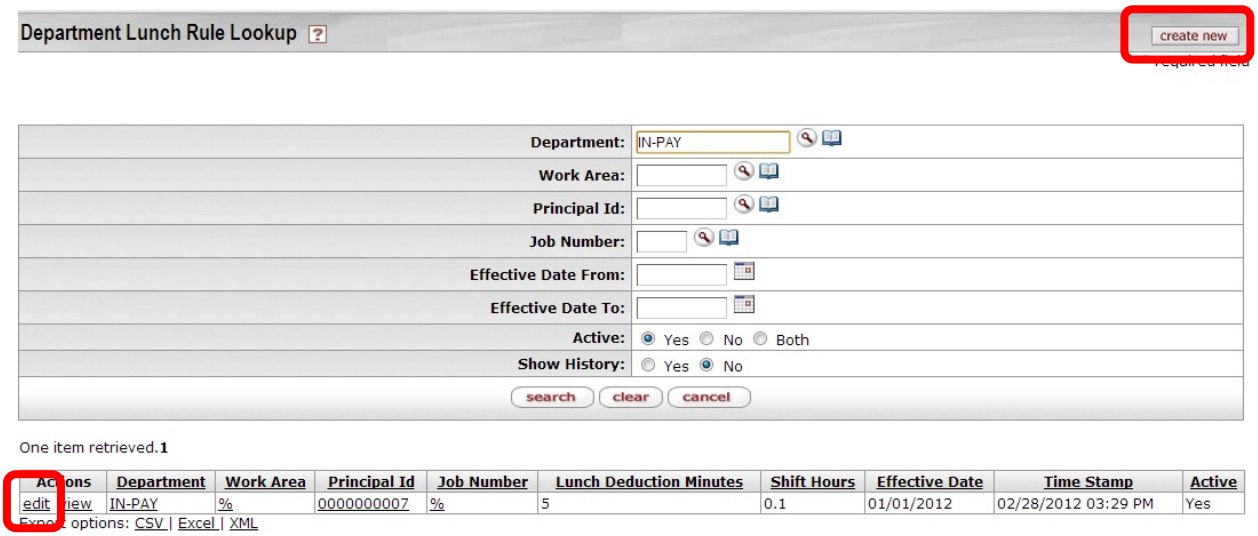
Use this rule for employees who clock in and out to determine the automatic deduction for their meal breaks.

Default Lunch Deduction: You can establish a default amount of meal hours (usually 30 minutes or 60 minutes) that are automatically deducted from the employee's work shift once they have worked the "defined" number of shift hours (usually a minimum of 6 hours).

Note: This rule does not apply to Manual-Entry employees.

1. Log into Kuali Time, go to the Admin tab, and click on Department Lunch Deduction Rule link.
2. This opens the Department Lunch Rule Lookup:
   - To create a new rule, click Create New (and skip to step 4).
   - To edit (or inactivate) an existing rule, enter your search criteria—Department, Work Area, Principal Id and/or employee Job Number. Then click Search (and continue to step 3).

HINT: Use the "%" symbol as a wildcard value in the Work Area, Principal Id, and Job Number fields to indicate "ALL."



3. In the search results, find the rule that you want to edit (or inactivate), go to the 'Actions' column (at left side of page) in that result row and click edit.
4. This opens the Department Lunch Rule document. Enter a "Document Overview" Description, (no matter whether you are creating, editing or inactivating a rule).
   - If all you want to do is inactivate this rule:
     a. In Effective Date field, enter the date when the rule will no longer apply.
     b. UNCHECK the "Active" checkbox in the right pane under "New."
     c. Then, skip to step 12, and submit the document.

   To create a new rule, you must enter values in all required fields marked by an asterisk (*). (Continue to Step 5.)

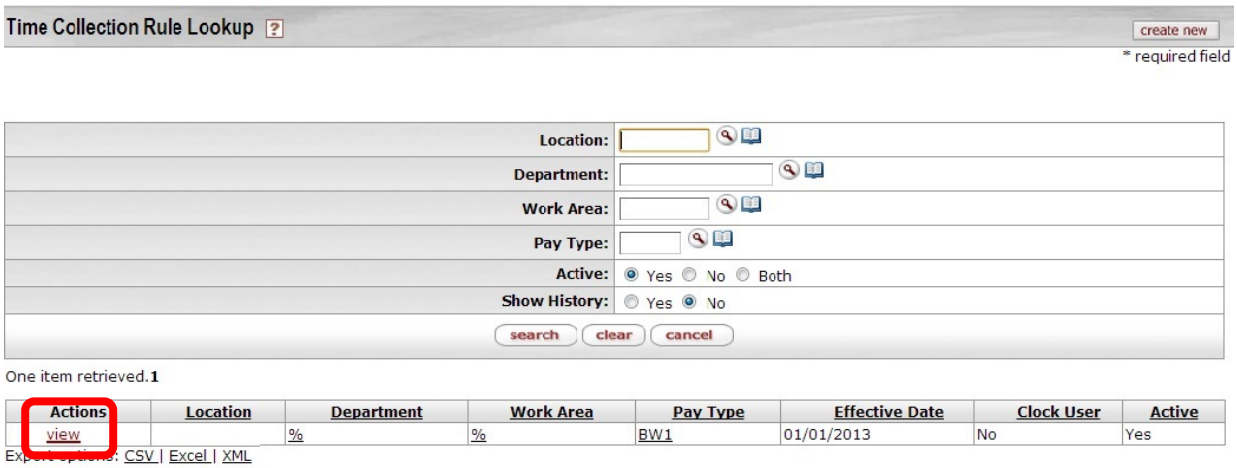
   To edit an existing rule, the document shows the "Old" values for that rule in the left pane and you can edit any of the fields in the right pane. (Continue to Step 5.)
5. Enter a valid Department Id, or verify the existing value is correct.
6. Enter a valid Work Area for that Department, or verify the existing value is correct. Note: (You can enter % as a wildcard to indicate ALL work areas.)
7. Enter a valid Principal Id, or verify the existing value is correct. Note: If you want this rule to affect only one employee in that Work Area, then enter a specific Principal Id. (You can enter % as a wildcard to indicate "ALL" employees for the specified Work Area(s).)
8. Enter a valid Job Number, or verify the existing value is correct. Note: If you want this rule to affect only one job record for employee(s), then enter a specific Job Number. (You can enter % as a wildcard to indicate "ALL" job records for the specified employee(s).)
9. Enter (or edit) the number of Lunch Deduction Minutes (usually 30 or 60 minutes).
10. Enter (or edit) the number of Shift Hours the employee must work before a meal is deducted (usually 6 hours).
11. Leave the "Active" box checked as the default value, unless you want to undo (inactivate) a rule. (In that case, when you establish a new version of a rule, leave the "Active" box unchecked.)
12. When finished entering, editing or verifying that the rule settings are correct, click Submit.
13. Click Close to close out of document.

Time Collection Rule

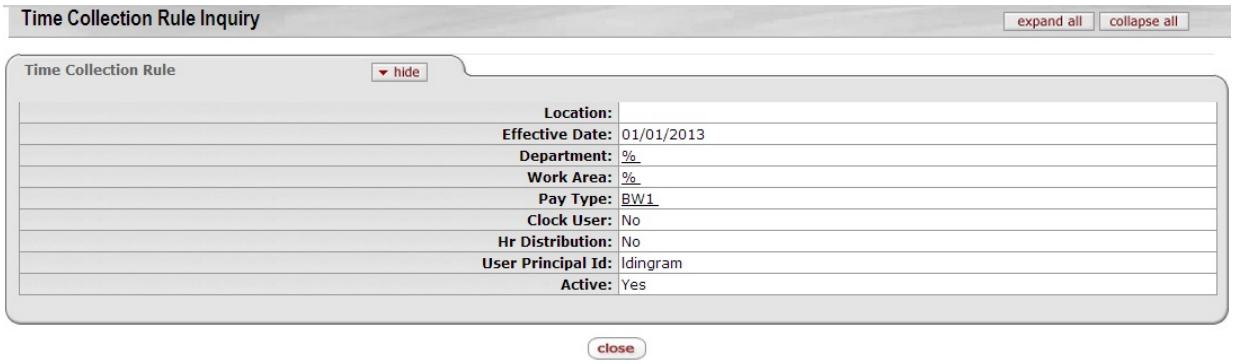
Use this rule to view how the employees in your department will interact with Kuali Time. Will they clock in and out (Clock-Entry) or will they record time blocks and leave hours directly on their timesheet (Manual-Entry).

Time Collection rules are managed centrally to ensure they follow established University, Campus and/or RC polices concerning how employees should enter their time.

1. Log into Kuali Time, go to the Admin tab, and click on Time Collection Rule link.
2. On the Time Collection Rule Lookup, enter your search criteria—Location, Department, Work Area and/or Pay Type.


Time Collection Rule Lookup
create new
* required field
Location:
Department:
Work Area:
Pay Type:
Active: Yes No Both
Show History: Yes No
search clear cancel
One item retrieved. 1
Actions Location Department Work Area Pay Type Effective Date Clock User Active
view % % BW1 01/01/2013 No Yes
Export options: CSV | Excel | XML

3. Click Search.
4. In the search results, you can click the view link to open an Inquiry screen and view the rule details.



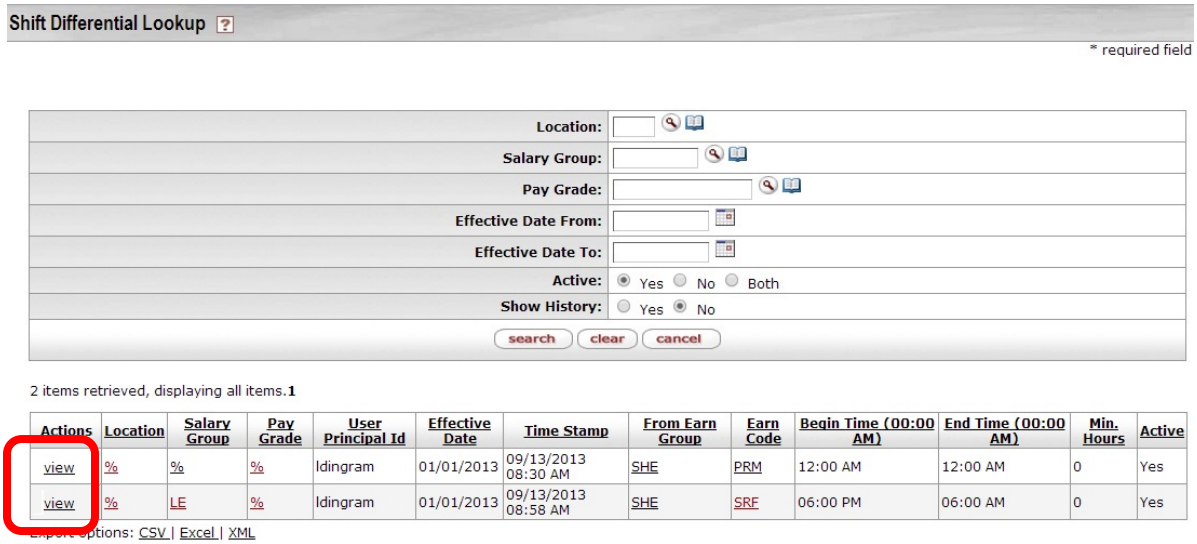
5. Clock Close to close the inquiry view.
6. Click Cancel to close the search results page.

Shift Differential Rule

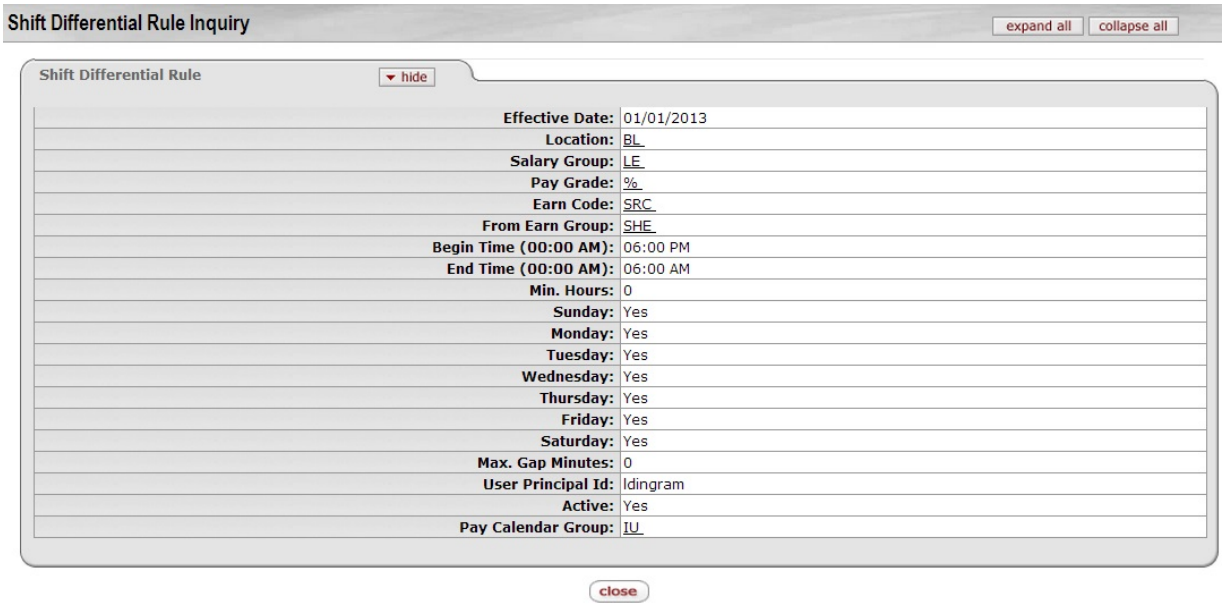
Use this rule to view any shift pay rules that may impact your employees. Shift Differential rules will follow University polices, so they are set up by the System Administrators.

1. Log into Kuali Time, go to the Admin tab, and click on Shift Differential Rule link.

2. On the Shift Differential Rule Lookup, enter your search criteria—Location, Salary Group, Pay Grade, and/or Effective Date From and Effective Date To.


Shift Differential Lookup
* required field
Location:
Salary Group:
Pay Grade:
Effective Date From:
Effective Date To:
Active: Yes No Both
Show History: Yes No
search clear cancel
2 items retrieved, displaying all items.1
Actions Location Salary Group Pay Grade User Principal Id Effective Date Time Stamp From Earn Group Earn Code Begin Time (00:00 AM) End Time (00:00 AM) Min. Hours Active
view % % % ldingram 01/01/2013 09/13/2013 08:30 AM SHE PRM 12:00 AM 12:00 AM 0 Yes
view % LE % ldingram 01/01/2013 09/13/2013 08:58 AM SHE SRF 06:00 PM 06:00 AM 0 Yes
Export options: CSV | Excel | XML

3. Click Search.
4. In the search results, you can click the View link to open an Inquiry screen and view the rule details.



5. Clock Close to close the inquiry view.
6. Click Cancel to close the search results page.

Administrative Functions

Department Administrators will use the Work Area Maintenance document to create new Work Areas and Tasks, to manage Time Approver (Supervisor) roles, and to add temporary Approver delegates.

Work Areas are used to divide a Department into groups based on Approvers. Employee time Assignments are associated with a Work Area. Approvers are also assigned by Work Area, therefore the Work Area drives routing for employee timesheets. Each Work Area can have one or more Time Approvers (Supervisors) assigned to it.

Tasks are optional sub-divisions of Work Areas. Assignments in Kuali Time can associate employees with a Work Area and with that Work Area's Tasks. Tasks allow departments to use increased tracking capabilities within a Work Area; for example, keeping track of the hours worked on a particular project.

Department Administrators can also view details about their Departments and about Earn Codes.

Creating a New Work Area

Use the Work Area maintenance document to view, create, edit or inactivate the Work Areas and Tasks that will exist for your Department. Work Area and Task numbers are unique and assigned by the system.

When creating a new work area the (Work Area) Description is important because that is what the employee sees when choosing an assignment to clock into.

In the Work Area maintenance document, you will select the 'Overtime Edit Role' to determine which role will be able to edit the Overtime Earn Code (and change it to Comp Time and vice versa).

You have the option to set the 'Default Overtime Edit Code' (as OVT)—but If you don't select a value in this field the timesheet will automatically compute Comp Time (CPE or NEC) when an employee works more than 40 hours in a week.

You have the option to add one or more Tasks to further sub-divide the work area for employees paid from multiple accounts or working on multiple projects.

The Time "Approver" (Supervisor) role is also assigned on the Work Area maintenance document. The Work Area must have at least one valid Approver to route a timesheet for approval.

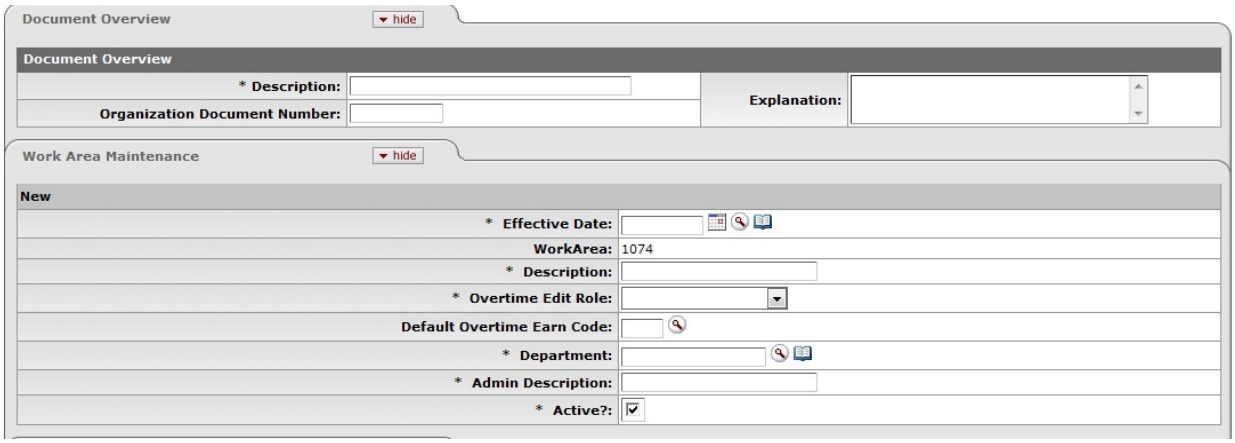
You can also assign the "Reviewer" role, which allows a user in that role to view and edit timesheets, and the "Approver Delegate" role to set up a temporary delegate to approve timesheets whenever a Supervisor is not available to do so.

To add a new Work Area:

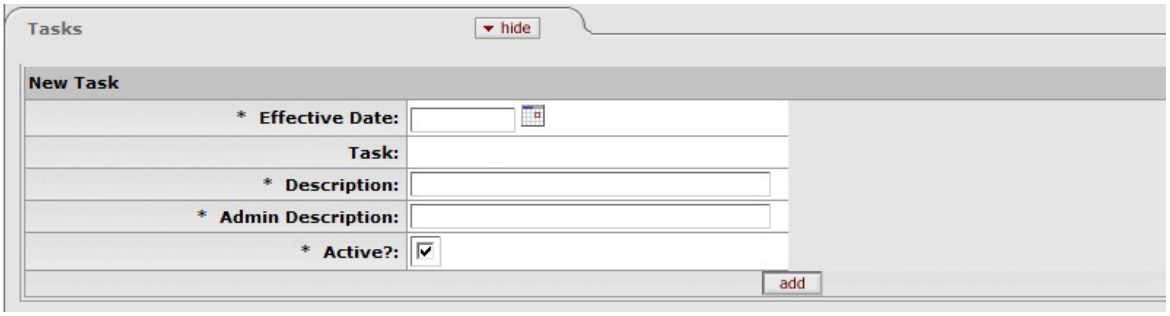
1. Log into Kuali Time, go to the Admin tab, and click on Work Area Maintenance link to open the Work Area Lookup.
2. Click Create New button to create a new rule (which opens a Work Area Maintenance document).

   Each Work Area Maintenance document is divided into four sub-sections: Document Overview, Work Area Maintenance, Tasks, and Roles. Required fields are marked by an asterisk (*).

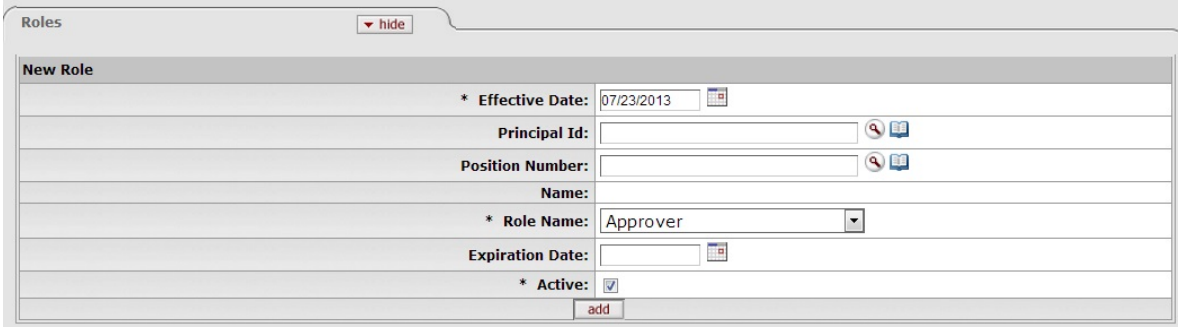
   (Note: New Work Area numbers and Task numbers are automatically generated by the system.)



3. At top of document under 'Document Overview,' enter the document Description.
4. In the 'Work Area Maintenance' sub-section:
    a. Enter the Effective Date that you want this Work Area to be effective.
    b. Enter the Work Area Description. (This is what the employee sees when selecting this Assignment to clock or enter hours.)
    c. Set the Overtime Preference for employees in that Work Area. This is split into two fields, the Default Overtime Earn Code, and the Overtime Edit Role. When you select an Overtime Edit Role it will allow that role and every role above it to edit. For example, if you select "Employee," then the Employee, Approver (Supervisor), and Payroll Processor can edit the overtime code.
        i. Select Overtime Edit Role (i.e., Employee, Approver, Approver Delegate, Payroll Processor, or Time Department Admin).
        ii. Enter Default Overtime Earn Code (OVT, CPE).
    d. Select your Department code (such as BL-RPAS or IN-SPEA)
    e. Enter the work area Admin Description. (This can be the same or different from the Description.)
    f. Leave "Active?" box checked.



5. (Optional step. Skip to step 6 if you are not adding Tasks.) To enter a New Task for the work area:
    a. In the Tasks sub-section, enter the Effective Date on which you wish this task to be effective.
    b. Enter the task Description. (This is what the employee sees when selecting this Assignment to clock or enter hours.)
    c. Enter the task Admin Description. (Can be the same or different from the Description.)
    d. Leave "Active?" box checked.
    e. Click Add. (The system will then assign a new Task number.)
    f. Repeat the "Task" steps (step 5) for each Task you wish to add under this Work Area.



6. To add a New Role for the work area:
    a. In the Roles sub-section, enter the Effective Date when you want this role to become active.
    b. Enter the Principal ID of the user you are assigning to this role.
    c. In the Role Name field, select the role you are assigning (i.e., Approver, Approver Delegate, or Reviewer).
    d. (Optional step) If this role is temporary, you can enter a date when you want this role to expire in the Expiration Date field.
    e. Leave "Active" box checked.
    f. Click Add.
    g. Repeat the "Role" steps (step 6) for each role you wish to add.

Note: You must have at least one person assigned to the "Approver" role.

7. After you've completed the work area document, click "Submit."
8. Click "Close" to exit from the document.

Adding a Delegate for a Time Approver

Delegation allows the Department Administrator to temporarily assign approval to another person. The intent of delegation is to allow an alternate to approve timesheets when the main approver is unavailable to do so. It does NOT permanently delegate those responsibilities to that user. Delegations are created by the Department Administrator using the Work Area maintenance document in Kuali Time.

Delegations are set to a specific person and work area. This means when a Supervisor who approves timesheets for three Work Areas goes on vacation, there should be three different delegates established to cover all of that Time Approver's responsibilities. Delegates should be chosen from among other Time Approvers or Payroll Processors.

To add a person as an Approver Delegate, follow these steps:

1. Log into Kuali Time, go to the Admin tab, and click on Work Area Maintenance link to open the Work Area Lookup.
2. In the Work Area Lookup screen, enter your search criteria (e.g., Department ID and/or Work Area) and click "Search."
3. In the search results, find the Work Area where you want to add an Approver Delegate, and in the "Actions" column click edit.
4. Enter a document Description.
5. Go to the 'Roles' sub-section, and enter the Effective Date on which you want this delegation to take effect.

6. To add a new delegate, type-in or select the Principal Id of that person.
7. Select Approver Delegate as the Role Name.
8. (Optional step) You can enter a date when you want this role to expire in the Expiration Date field.
9. Click Add to add the role to the document.
10. Leave "Active" box checked.
11. When finished with your entries, click "Submit."
12. Click "Close" to exit from the document.

Editing a Work Area, Task or Role

Use the Work Area Maintenance document to edit an existing Work Area, the Tasks under that Work Area, or the Roles (Approver, Reviewer and Approver Delegate) you have assigned to review or approve timesheets for that Work Area.

To edit an existing Work Area, including the Tasks and Roles for that Work Area:

1. Log into Kuali Time, go to the Admin tab, and click on Work Area Maintenance link to open the Work Area Lookup.
2. In the Work Area Lookup screen, enter your search criteria (e.g., Department ID and/or Work Area) and click "Search."
3. In the search results, find the Work Area you want to edit, and in the "Actions" column of that search result click edit.
4. Edit the appropriate fields in the 'Work Area Maintenance' sub-section. Be sure to enter a document Description and to check the Effective Date. Leave the 'Active?' box checked as the default value, unless you want to "inactivate" this Work Area.
5. (If you don't use Tasks, skip this step.) You can add, edit or inactivate Tasks for this Work Area:
    - To add a New Task, go to the blank fields at the top of the 'Tasks' sub-section and enter values in all required fields, then click Add. (The system will then assign a new Task number.)
    - To edit an existing Task, change the appropriate fields for that Task under the 'New' section on the right side of the 'Tasks' sub-section.
    - To delete an existing Task, find the Task you want to remove and click "Delete."
    - To inactivate an existing Task, UNCHECK the 'Active?' box for that Task. (Note: You will be unable to inactivate a Task that is currently being used in an active Assignment.)
6. In the 'Roles' sub-section, you can add new roles, edit existing roles, or inactivate a role:
    - To add a New Role, as an "Approver, Approver Delegate or Reviewer," go to the blank fields at the top of the 'Roles' sub-section and enter values in all required fields, then click Add. (You must assign a role to a person.)
    - To edit an existing Role, change the appropriate fields for that Role under the 'New' section in the right pane of the 'Roles' sub-section. You could change the Principal Id of the person in that role, or you could change their role to "Approver, Approver Delegate or Reviewer." If this is a temporary role, you can also edit or enter the date you want this role to expire, in the Expiration Date field.
    - To remove a user from an 'Approver, Approver Delegate or Reviewer' role, click "Delete."

- To inactivate a user from an "Approver, Approver Delegate or Reviewer" role, you can UNCHECK the 'Active' box for that role. (The person removed will then show under the 'Inactive Roles' sub-section of the document.)

7. When finished editing the Work Area document, click "Submit."
8. Click "Close" to exit from the document.

Inactivating a Work Area

You can inactivate a Work Area if there are no active Assignments under either the Tasks or the Work Area.

To inactivate an existing Work Area:

1. Log into Kuali Time, go to the Admin tab, and click on Work Area Maintenance link to open the Work Area Lookup.
2. In the Work Area Lookup screen, enter your search criteria (e.g., Department ID and/or Work Area) and click "Search."
3. In the search results, find the Work Area you want to inactivate, and in the "Actions" column click edit.
4. Enter a document Description.
5. To inactivate the Work Area (which will inactivate all the Tasks and Roles under that Work Area):
    a. Go to the 'Work Area Maintenance' sub-section and in the New section on the right, enter the Effective Date on which you want the Work Area to be inactive.
    b. Then, UNCHECK the 'Active?' box for that Work Area. Note: You will be unable to inactivate a Work Area or a Work Area with Tasks that is currently being used in an active Assignment.)
6. Click "Submit."
7. Click "Close" to close out of the document.

Removing a Task

You can remove a Task if there are no active Assignments under that Task.

To remove a Task for a Work Area:

1. Log into Kuali Time, go to the Admin tab, and click on Work Area Maintenance link to open the Work Area Lookup.
2. In the Work Area Lookup screen, enter your search criteria (e.g., Department ID and/or Work Area) and click "Search."
3. In the search results, find the Work Area where the Task you want to remove belongs, and in the "Actions" column click edit.
4. Enter a document Description.
5. To remove a specific Task under that Work Area, click "Delete."
6. Click "Submit."
7. Click "Close" to exit from the document.

Removing an Approver, Approver Delegate or Reviewer Role

You can remove a Time Approver, Approver Delegate or Reviewer role for a Work Area. (Note: For the Time Approver role, at least one person must be assigned to that role. You will be unable to remove this role if it is the only Approver role for this Work Area.)

To remove a Role for a Work Area:

1. Log into Kuali Time, go to the Admin tab, and click on Work Area Maintenance link to open the Work Area Lookup.
2. In the Work Area Lookup screen, enter your search criteria (e.g., Department ID and/or Work Area) and click “Search.”
3. In the search results, find the Work Area where the Role you want to remove belongs, and in the “Actions” column click edit.
4. Enter a document Description.
5. Go to the ‘Roles’ sub-section and find the role you want to remove, then click “Delete.”
6. Click “Submit.”
7. Click “Close” to exit from the document.

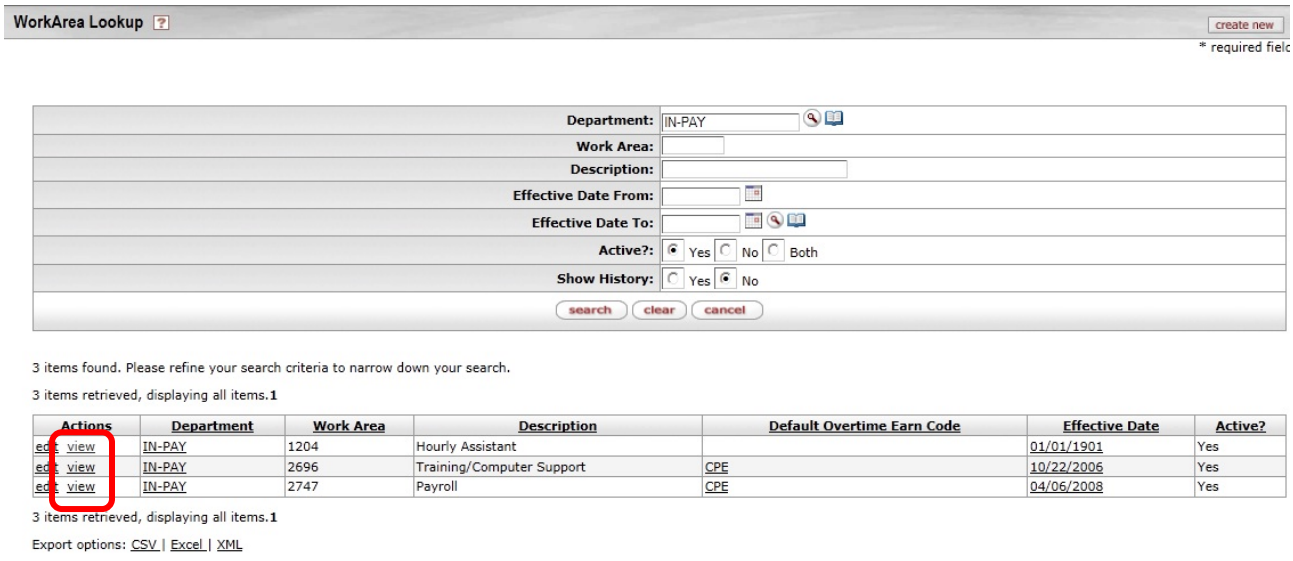
Viewing Work Area Details

To view the details for a Work Area (including Tasks and Roles):

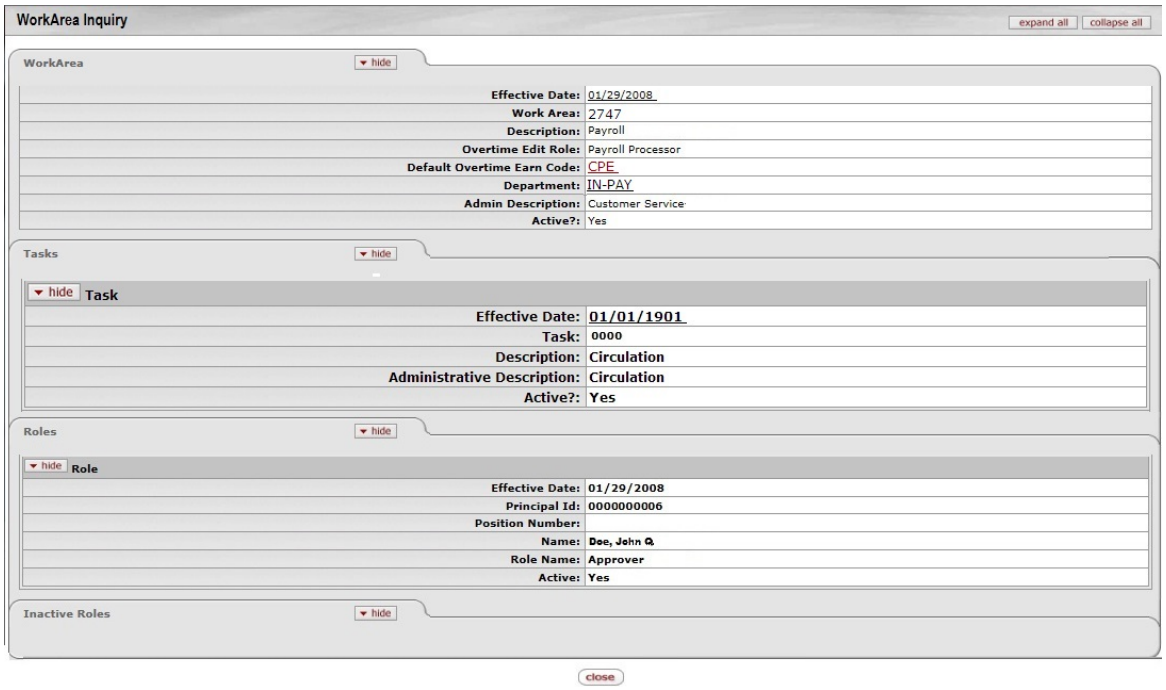
1. Log into Kuali Time, go to the Admin tab, and click on Work Area Maintenance link.
2. On the Work Area Maintenance Lookup, enter your search criteria—Department, Work Area, Description, Effective Date From or Effective Date To.

HINT: Use the “%” symbol in any field (except date fields) as a wildcard value to indicate “ALL.”

3. Click Search to find Work Area results.


WorkArea Lookup
create new
* required field
Department: IN-PAY
Work Area:
Description:
Effective Date From:
Effective Date To:
Active?: Yes No Both
Show History: Yes No
search clear cancel
3 items found. Please refine your search criteria to narrow down your search.
3 items retrieved, displaying all items.1
Actions Department Work Area Description Default Overtime Earn Code Effective Date Active?
edit view IN-PAY 1204 Hourly Assistant 01/01/1901 Yes
edit view IN-PAY 2696 Training/Computer Support CPE 10/22/2006 Yes
edit view IN-PAY 2747 Payroll CPE 04/06/2008 Yes
3 items retrieved, displaying all items.1
Export options: CSV | Excel | XML

4. In the search results, click view to view the details for that Work Area. That opens the Work Area Inquiry page where you can view details about the Work Area, including Tasks, and the users assigned as timesheet Approvers, Reviewers, or Approver Delegates.



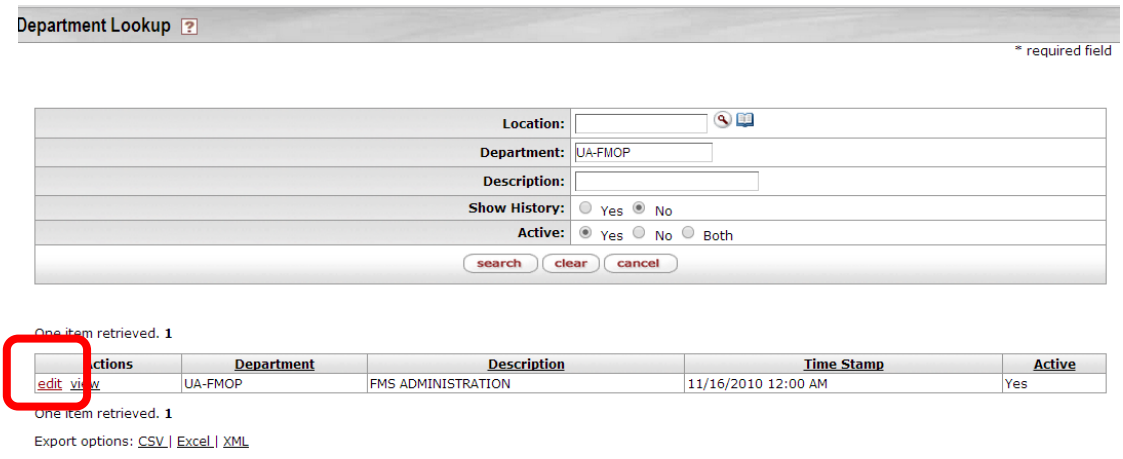
5. Clock Close to close the inquiry page.
6. Click Cancel to close the search results page and return to the Admin tab.

Adding Departmental Roles (Department Admin, Department View Only, Payroll Processor and Payroll Processor Delegate)

Use the Department maintenance screen to add the following roles for your department: Department Administrator, Department View Only, Payroll Processor and Payroll Processor Delegate. This screen also allows you to view a list of users who hold these roles for any other department.

To add a new Role (Payroll Processor, Payroll Processor Delegate, Department Admin or Department View Only):

1. Log into Kuali Time, go to the *Admin* tab, and click on Department link.



2. On the Department Lookup, enter your Department and click “Search.”
3. Click on the edit link to open the Department Document maintenance screen.
4. Enter a document Description.
5. To add a new Role:
    a. Go to the ‘Roles’ sub-section and enter the Effective Date when you want this role to be active.
    b. Enter or select the Principal Id of the user who will be assigned the role.
    c. Select the Role Name for this user: Payroll Processor, Payroll Processor Delegate, (Time) Department Admin, or (Time) Department View Only.
6. If this is temporary role (such as a Payroll Processor Delegate who is covering for someone on vacation or leave of absence), then enter a date when the role will expire into the Expiration Date field.
7. Leave “Active” box checked.
8. Click “Add” to add the role to the document.
9. Repeat steps 5 through 8 for each role you need to add.
10. When finished adding roles, click “Submit.”
11. Click “Close” to exit from the document.

Removing Departmental Roles

Use the Department maintenance screen to remove the following roles for your department: Department Administrator, Department View Only, Payroll Processor and Payroll Processor Delegate.

Note: For the Payroll Processor role, at least one person must be assigned to that role.

To remove a Departmental role for a user:

1. Log into Kuali Time, go to the *Admin* tab, and click on Department link.
2. On the Department Lookup, enter your Department and click **Search**.
3. Click on the edit link to open the Department Document maintenance screen.
4. Enter a document Description.
5. Go to the ‘Roles’ sub-section, find the role you want to remove and click “Delete.” (Repeat this step for each role you need to remove.)
6. When finished with your edits, click “Submit.”
7. Click “Close” to exit the document.

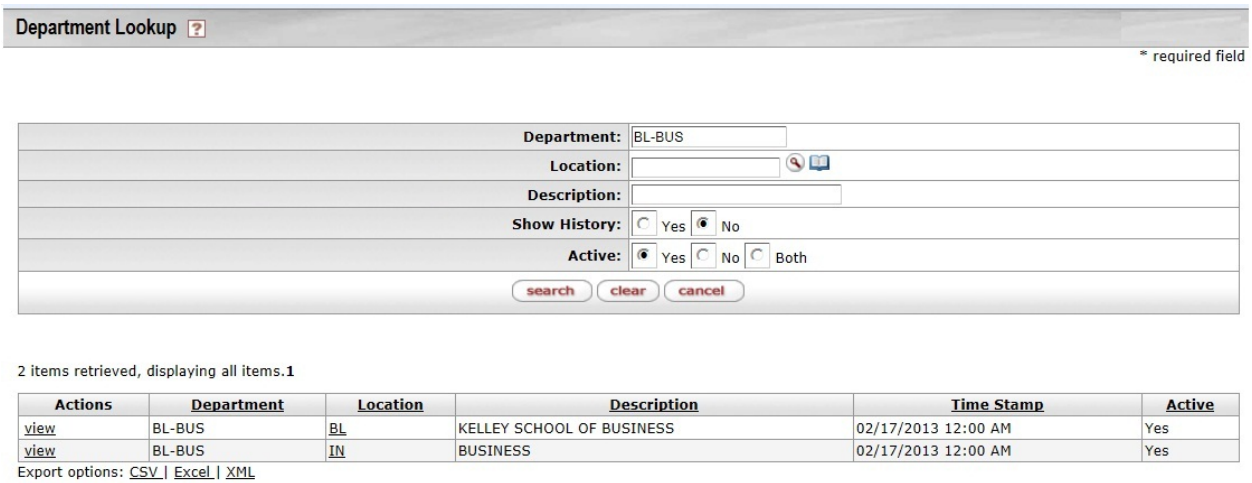
Viewing Department Details

To view the details for a Department which includes a list of users who are assigned Roles:

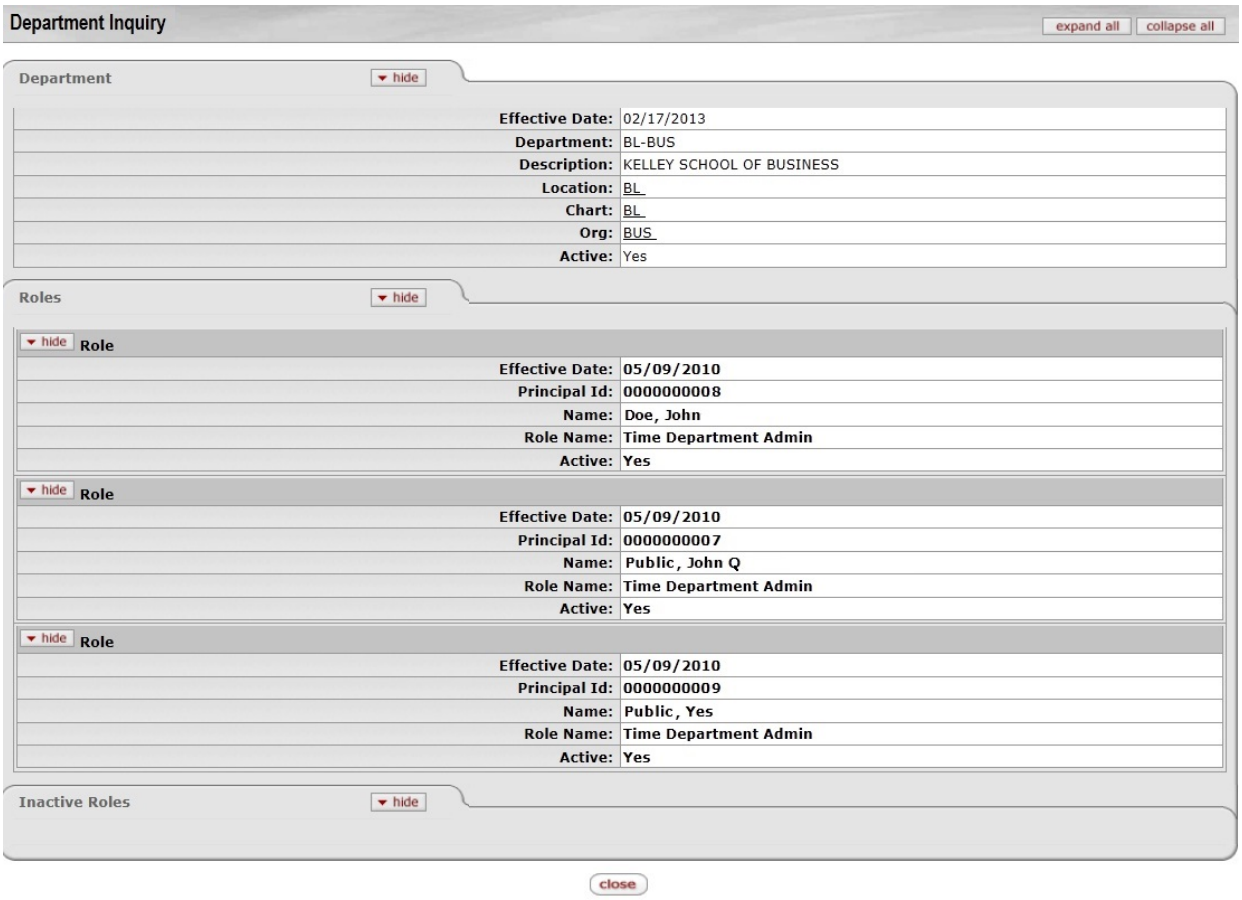
1. Log into Kuali Time, go to the Admin tab, and click on Department link.
2. On the Department Lookup, enter your search criteria—Department, Location, and/or Description.

HINT: Use the “%” symbol in any field (except date fields) as a wildcard value to indicate “ALL.”

3. Click Search to find your Department.


Department Lookup
* required field
Department: BL-BUS
Location:
Description:
Show History: Yes No
Active: Yes No Both
search clear cancel
2 items retrieved, displaying all items.1
Actions | Department | Location | Description | Time Stamp | Active
view | BL-BUS | BL | KELLEY SCHOOL OF BUSINESS | 02/17/2013 12:00 AM | Yes
view | BL-BUS | IN | BUSINESS | 02/17/2013 12:00 AM | Yes
Export options: CSV | Excel | XML

4. In the search results, click view to view the details for that Department. That opens the Department Inquiry page where you can view details about the Department, and the users who have administrative or view-only Roles in that Department.



5. Clock “Close” to close the inquiry page.
6. Click “Cancel” to close the search results page and return to the Admin tab.

Viewing Earn Code Details

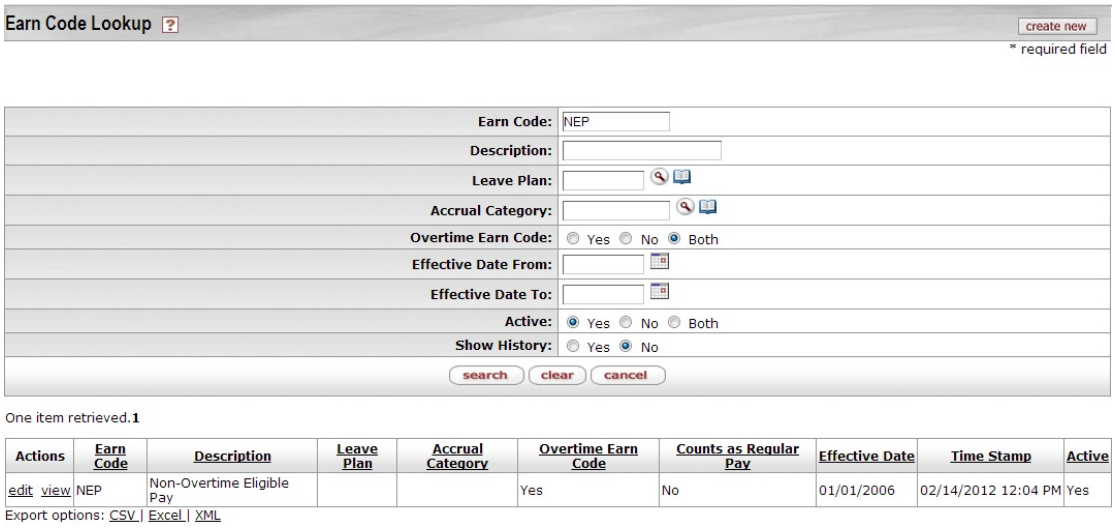
Use the Earn Code lookup screen to search for and view details about specific earn codes, such as the description, accrual category, whether it is an overtime earn code, has an inflate factor, counts as regular pay, or how it is recorded on the timesheet (Time, Hours, or Amount).

To view the details for an Earn Code:

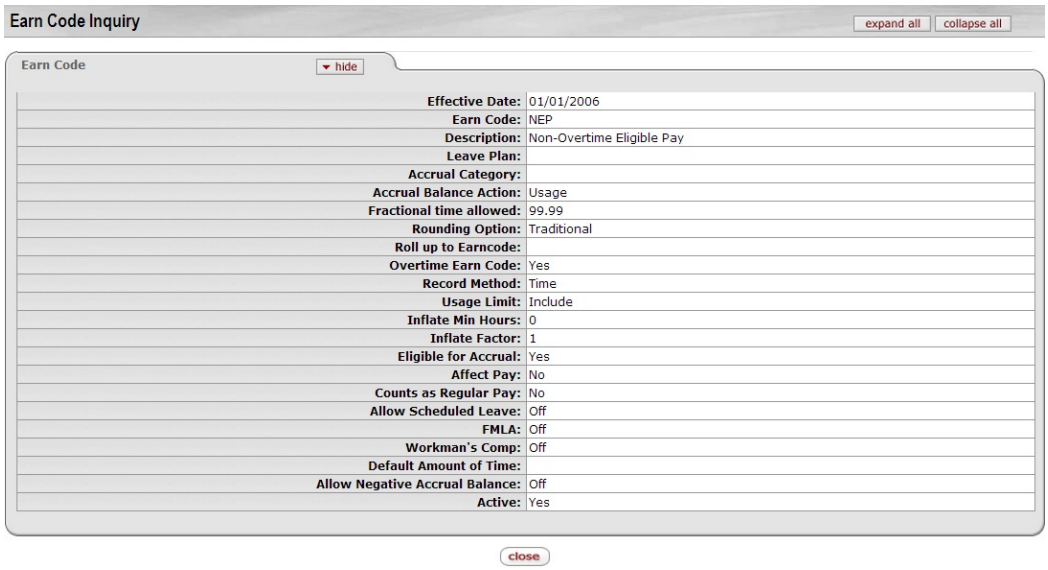
1. Log into Kuali Time, go to the Admin tab, and click on Earn Code link.
2. On the Earn Code Lookup, enter your search criteria—Earn Code, Description, Leave Plan, Accrual Category, Overtime Earn Code (Y or N), and/or Effective Date From and Effective Date To.

HINT: Use the "%" symbol in any field (except date fields) as a wildcard value to indicate "ALL."

3. Click "Search" to find your Earn Code.


Earn Code Lookup
create new
* required field
Earn Code: NEP
Description:
Leave Plan:
Accrual Category:
Overtime Earn Code: Yes No Both
Effective Date From:
Effective Date To:
Active: Yes No Both
Show History: Yes No
search clear cancel
One item retrieved.1
Actions | Earn Code | Description | Leave Plan | Accrual Category | Overtime Earn Code | Counts as Regular Pay | Effective Date | Time Stamp | Active
edit view | NEP | Non-Overtime Eligible Pay | | | Yes | No | 01/01/2006 | 02/14/2012 12:04 PM | Yes
Export options: CSV | Excel | XML

4. In the search results, click view to view the details for that Earn Code. That opens the Department Inquiry page where you can view details about the Department, and the users who have administrative or view-only Roles in that Department.



5. Clock “Close” to close the inquiry page.
6. Click “Cancel” to close the search results page and return to the Admin tab.

Inquiries

On the Admin tab, Kuali Time provides four Inquiry screens that are useful tools for looking at the Time Blocks recorded on a timesheet, the historical Time Block entries on a timesheet, the clock transactions logged for an employee, or the Missed Punch documents submitted by or for an employee.

- Use the Time Block lookup screen to view the recorded Time Blocks present on a particular timesheet.
- Use the Time Block History Detail lookup screen to view the history of Time Blocks added, updated or deleted on a particular timesheet.
- Use the Clock Log lookup screen to view the real-time clock transactions logged on a particular timesheet, including the IP Addresses where the transaction was clocked.
- Use the Missed Punch Document Search screen to view any Missed Punch documents submitted to record a missed clock in or clock out action by an employee.

Additional information about these inquiry pages is provided in other sections of this manual. Please see the topics entitled, “Time Block Inquiry, Time Block History Inquiry, Clock Log Inquiry and Missed Punch Inquiry.”

Maintaining Time Assignments through eDocs

Kuali Time Assignments (for Work Areas and Tasks) are made and managed through HRMS eDocs. Assignments can be established in the ‘Hire’ eDoc when an employee is hired. New assignments can be added using the ‘Maintain Time Assignment’ eDoc after an employee is hired and existing assignments can be changed and deleted using this document.

Other eDocs that prompt users for job funding information (such as ‘Maintain Pay Rate’ or ‘Transfer Employee’ eDocs) also have special options available to allow Departments to add, update or delete Kuali Time Assignments. Anyone who processes eDocs for Departments using Kuali Time should be familiar with establishing the correct

Work Area (for timesheet routing) and funding for Kuali Time employees. Missing or incomplete assignment and funding information in an eDoc for Kuali Time employees can inadvertently delete existing assignments.

New Hires

When a Department using Kuali Time creates a 'Hire' eDoc for an hourly or biweekly employee they will be given the opportunity to add Kuali Time Assignments on the Earnings tab for that new employee as part of the Hire.

In the Funding Type section of the 'Hire' eDoc, select "Timekeeping" as the Funding Type.

In the Timekeeping Assignment section, enter/select the Work Area (required field). (You also have the option to break an employee's assignment down to the Task-level by entering/selecting a Task under that Work Area.)

In the Earning section, enter/select the Voucher Code (required field).

Accounting Lines are also required to fund the job, so click the 'Add Accounting Line' button to open that section on the eDoc, and then enter the Account number and Percent being funded by that account.

You also have the option to enter values in the Sub Account and Sub Object fields, which will include those funding details in the Labor Ledger.

To enter multiple accounts, select the 'Add Accounting Line' button again, and enter the appropriate Account number and Percent. The total of the all accounts must equal 100%.

For additional help in initiating or approving eDocs, please see the HRMS SOS (System Online Support) at: http://sos.uhrs.indiana.edu/

Please Note: Only Work Areas that were effective as of the effective date of the hire will be presented as valid Work Areas to choose from. Work Areas can be specific to either hourly or biweekly employees or you can set up one work area for both employee types.

Voucher Code: This determines what payroll voucher an employee's job will appear on. Only Voucher Codes belonging to the Department that owns this position will be available to choose from. Use the lookup screen to do a search or to see a list of all the available Voucher Codes.

Routing: This document will route to the Fiscal and Personnel Approvers and through any Organizational routing established. Final approval varies based on campus. On the Bloomington campus documents will route to Human Resources for final approval except for documents involving Hourly Work Study employees, which will route to Bloomington Payroll or the Maintain TIME Assignment eDocs which will route to Bloomington FMS for final approval. On the IUPUI campus hire documents will route to Human Resources for final approval.

Assuming the document used a current or earlier effective date, the Time Assignments made on an eDoc document will be available 60 minutes after the eDoc is routed. This document does not need to be final approved in order for the Time Assignments to become available on the timesheet. It may take up to an hour after initiation for the system to generate a new timesheet and allow this employee access to Kuali Time. If the document is disapproved during the routing the resultant Time Assignments will be terminated.

Please Note: While the employee may be able to record hours in Kuali Time shortly after this document is routed the employee will not appear on a payroll voucher until the Hire document has been final approved and saved to PeopleSoft.

Please be aware of the following:

- An employee will not appear on the payroll voucher and cannot be paid through Kuali Time unless the Hire eDoc has received final approval and been saved to PeopleSoft.
- eDocs must be received in the final approver's Action List before the UHRS eDoc processing deadline for that pay period.
- This final approval and save to PeopleSoft must happen before the job pay flag has been turned off for that pay period (for specific dates see the payroll bulletins and calendars here: https://fms.iu.edu/payroll/payroll-calendars/

If the eDoc is NOT final approved and saved to PeopleSoft in time to appear on the voucher then any hours recorded in the Kuali Time system will not be transmitted to the voucher and you must complete an adjustment voucher to pay that employee for that period.

New Employees and Kuali Time Log In: If hiring a brand new person (i.e., someone not currently in PeopleSoft), that employee will need to have a valid user ID before they can log in to the Kuali Time system. It generally takes a couple days for the ID table to be updated after the person is initially hired. New Time Assignments should be added within 60 minutes of processing the hire, but until the employee has a user ID established they may not be able to login to Kuali Time.

Understanding Assignments and Funding

When hiring an employee with a single assignment and a single funding source, enter 100%. All of the expenses associated with the work done on this assignment will be paid 100% against the accounting string that you've indicated.

If hiring an employee into a single assignment with multiple funding sources you'll need to fill this component out twice, once for each (account) funding source. In this case the percentages entered should be relative to how you want the funding split between the two sources. For instance, if you want hours worked to be split evenly between two accounts then both accounting lines would have a percentage of 50. If you wished three-quarters of an assignment's hours to be charged to one account and one quarter to another, you would need to enter percentages of 75 and 25.

Remember that you must distribute 100% of each earn code for which you establish funding on the eDoc Hire: Job Funding screen. For employees with multiple assignments, percentages are not relative to each other. Percentages are only relative to other percentages for that same assignment.

The funding percentage assigned to an accounting line of an assignment is calculated by first identifying all accounting lines associated with a unique work area/task combination. Divide the percentage entered on the e-doc for that accounting line by the sum of all the percentages associated with that work area/task combination.

Example: You hire an hourly employee who will have multiple assignments on the same job. You want one assignment to be split funded and the other to be funded from a single account.

You would enter the following accounting lines and percentages on the Accounting Lines of your eDoc.

Work Area	Task	Account Number	Sub Account	Sub Object	Project	Org Ref ID	Percent
1	A	1912610	----	----	----	----	25%
1	A	1912611	----	----	----	----	25%
1	B	1036200	----	----	----	----	50%

This is a valid distribution because all the percentages added together equal 100. All hours worked on assignment 1/A will be split 50/50 between accounts 1912610 and 1912611. All hours worked on assignment 1/B will be paid 100% from account 1036200, because there are no other distributions of any kind for this assignment.

The actual split job funding for assignment 1/A will be 50% from Account 1912610 and 50% from Account 1912611. The actual job funding for the second assignment, 1/B will be 100% from Account 1036200.

If you are you unsure whether or not your funding entries are correct in your 'Hire' (or Maintain TIME Assignment) eDoc, click "Continue/Submit" and the system will display an error message that tells you what fields you need to correct.

Terminations

If a Termination eDoc is processed for a current or past effective date, then any Kuali Time Assignments associated with the terminated job will be inactivated within 60 minutes after the routing of the eDoc. Future dated terminations will deactivate the assignment on the effective date of the termination.

You do not have to deactivate the Kuali Time Assignments for the terminated job.

Adding / Editing / Removing a Time Assignment

If an employee already has a job in a Department using Kuali Time, please use the 'Maintain TIME Assignment' eDoc to add a new Time Assignment, edit a current Time Assignment, or to remove a current Time Assignment.

You also have the option to add a New Earn Code (if you want to fund overtime, for example, to a different account from the employee's regular hours).

1. Open the Maintain TIME Assignments eDoc.
2. Use the Document Lookup Screen to search for the Employee and/or Job. Click the Maintain Time Assignments Document link beside the employee and job record you want.
3. Enter an Effective Date and click Continue.
    - If adding a new Assignment or editing a current one, use the date (preferably at the start of a Pay Period) that you want this employee to be able to record hours under this Assignment in Kuali Time.
    - If removing an Assignment, use the date that you longer wish this employee to be able to record hours in Kuali Time for the deleted assignment.
4. Find the Funding Type, Timekeeping Assignment and Earning sections of the eDoc:
    - If you are adding a new Assignment:
        a. Select "Timekeeping" as the Funding Type.
        b. Enter or select the Work Area (a required field). You also have the option to enter or select a Task, if you are breaking this employee's job assignment down to the task-level.
        c. Enter or select the Voucher Code (a required field).
        d. Accounting lines are required to fund this job, so click the "add accounting line" button (located below the Voucher Code field) which opens the Accounting Line section on the page. In those fields, enter the Account number and Percent being funded by that account (required fields).
        e. (Optional step) You also have the option to enter values in the Sub Account and Sub Object fields, so those funding details are included in the Labor Ledger.

f. To enter multiple accounts, click on the "add accounting line' button again, and enter the appropriate Account number and Percent. The total of the all accounts must equal 100%.
g. If you need to add another Assignment (for hourly employees only), click "add assignment" button (located under Work Area/Task fields) and repeat Steps a. through f.
h. (If you need to edit or remove other Assignments for this employee, go to Step 5; otherwise, if you are finished adding new Assignments, skip to Step 6.)

- If there are current Assignments for this employee, all the Assignments active as of the entered effective date will be displayed on the page. (Continue to Step 5.)

5. Find the Timekeeping Assignment you want to edit or remove.

   - To remove that one Assignment:

     a. Click "Remove Assignment" button (located under the Work Area/Task fields). The screen will reload and the assignment information is deleted (blanked out) in the right pane (and highlighted in yellow) to indicate it is no longer there.
     b. If you need to remove another Assignment, repeat Step a.
     c. (If you need to edit other Assignments for this employee, continue with Step 5; otherwise, when finished removing Assignments, skip to Step 6.)

   - To edit that one Assignment:

     a. Edit the Work Area only if you need to change it. You can type in a new Work Area or select one from the dropdown list. (If changed, the field line will be highlighted in yellow.)
     b. Add, edit or delete any Task you need to change.
     c. Edit the Voucher Code only if you need to change it.
     d. You can add, edit or remove the accounting lines that fund this employee's job.
        i. Edit any Accounts you need to change.
        ii. To add a new Account, click "add accounting line" button and enter the Account and Percent values.
        iii. To remove an account, click "remove accounting line" button.
     e. You may also need to change the Percent so it totals 100% (for that Work Area/Task).
     f. If you need to edit another Assignment, repeat Steps a. through e.
     g. (If you need to remove an Assignment for this employee, follow those steps in Step 5 above; otherwise, if you are finished editing Assignments, continue to Step 6.)

6. (Optional step) You can also click "add earnings" button to add a New Earn Code (OVT for example), if you need to fund those hours under a different Account (from regular hours). If you add a new Earn Code to the document, you must repeat Step 4 (above) to enter the Funding Type, Timekeeping Assignment and Earning values.

7. Click Submit to route the document for approval.

Please Note: This is a quick review of the steps to initiate this document to add, edit or remove Kuali Time Assignments. For additional help in initiating or approving eDocs, please see the HRMS SOS (System Online Support) at: http://sos.uhrs.indiana.edu/

Please Note: When completing the Maintain TIME Assignments document the employee must have at least one Kuali Time Assignment or the document will not route. Also, 100% of regular earnings must be accounted for.

To remove the last Kuali Time assignment an employee has, see the section entitled, "Removing an Employee from Kuali Time" below.

Routing: This document will route to the Fiscal and Personnel Approvers and through any Organizational routing established. Final approval of Maintain TIME Assignment documents is performed by a campus-specific workgroup associated with that campus' Payroll Office.

Assuming the document used a current or earlier effective date, the Kuali Time assignments added or edited on this document will be updated 60 minutes after the document is routed for approval. Any Kuali Time Assignments deleted on this document will be removed 60 minutes after the E-Doc is routed. This document does not need to be final approved in order for the Kuali Time assignments to be added, updated, or removed. If the document is disapproved during the routing the resultant Kuali Time assignments will either revert back to their previous attributes (when initially added or edited), or reestablished (when initially removed).

For additional help in initiating or approving eDocs, please see the HRMS SOS (System Online Support) at: http://sos.uhrs.indiana.edu/

Editing Earnings Information

Earnings information, including Voucher Code, is normally set up as part of Job Funding when an employee is hired. Earnings information should be maintained for employees using the Kuali Time system by completing a 'Maintain TIME Assignment' eDoc.

Removing an Employee from Kuali Time

If an employee's job is terminated then all Kuali Time Assignments associated with that job will be terminated as well.

If you wish to keep an employee's job active, but no longer wish to have that employee record their hours in Kuali Time, you may process a 'Maintain Funding' eDoc to establish regular funding (Percent or Amount) for that job. Once this document is routed all Kuali Time Assignments associated with that job will be terminated.

Other eDocs that have a funding component, such as Maintain Job Data, Transfer Employee, and Maintain Pay Rate, may also be used to establish regular funding for an employee's job and remove them from Kuali Time.

HRMS Updates to Kuali Time

Most assignment changes will be reflected in Kuali Time within 60 minutes after the eDoc is routed. If the employee does not yet have a timesheet in Kuali Time, that is, they have no other current Time Assignments, it may take up to one hour for the system to generate the employee's timesheet and allow them access to the system. If the employee is a mid-pay period hire, the system will generate a timesheet for that employee whenever they log into Kuali Time.